

**1. Purpose**

This SOP outlines the roles, responsibilities, and processes for UWNSV's Fund Distribution Volunteer Program. It provides a consistent framework for evaluating Community Impact Grant applications, ensuring accountability, equity, and alignment with community needs.

**2. Program Overview**

Each year, more than 50 community volunteers support the equitable distribution of United Way funds through a competitive grant review process. Volunteers assess funding requests from local nonprofits, participate in site visits, and recommend funding allocations based on community impact, program quality, and alignment with UWNSV's priorities.

**3. About the Community Impact Grant Program**

Originally launched in 2003 as the Venture Grant Program, the Community Impact Grant Program targets urgent health and human care needs identified through the Community Needs Assessment and ALICE Report. Grants support programs in the following focus areas:

* **Health** – Build healthier communities
* **Education** – Invest in our children
* **Financial Stability** – Create economic opportunity for all

Funding recommendations from panels are reviewed by the Community Investment Committee and approved by the UWNSV Board of Directors.

**4. Who Can Volunteer**

Volunteers may include UWNSV donors, residents, and community leaders. UWNSV encourages diverse representation across business, nonprofit, and civic sectors.

**Eligibility Criteria:**

* Must be at least 16 years old
* Comfortable with basic technology (Zoom, Excel, Microsoft Word)
* Reside in or be familiar with:
	+ City of Winchester
	+ Frederick, Clarke, Warren, Shenandoah, or Page Counties
* **To avoid conflicts of interest, individuals actively submitting or representing a grant application during the current cycle are not eligible to serve as panelists.** We appreciate the desire to serve and encourage re-engagement during future cycles.

**5. Time Commitment**

* **Cycle Duration:** April–May
* **Total Estimated Time:** 10 hours
	+ ~5 hours: Training, application review
	+ ~5 hours: Meetings, presentations, site visits

Most activity occurs during regular business hours. See the Volunteer Calendar for details.

**6. Volunteer Responsibilities**

* Review application materials in advance of site visits
* Evaluate agency alignment with UWNSV focus areas using scoring rubrics
* Attend and participate in panel meetings, presentations, and site visits
* Collaborate respectfully with panel members to recommend funding
* Report concerns to panel chairs or UWNSV staff
* Identify opportunities for agency collaboration or service improvement

**7. Panel Chair Role**

Each panel is led by a Panel Chair, who ensures the process runs smoothly and equitably.

**Panel Chair Duties:**

* Schedule and coordinate panel meetings and site visits
* Facilitate group discussion and ensure full participation
* Guide scoring and ensure consistency in rubric interpretation
* Submit final recommendations to staff
* Report major issues or concerns to UWNSV
* Serve as the point of contact for volunteer panelists

Ideal Panel Chairs are organized, collaborative, and confident leading small group conversations.

**8. Site Visit & Presentation Expectations**

All agencies participate in a combined site visit and presentation, whether in person or via Zoom.

**2025 Format & Structure:**

* **Total Time: 20 minutes**
	+ 5 minutes: General site tour or program overview
	+ 10 minutes: Focused discussion of funding request
	+ 5 minutes: Questions and wrap-up
* **No formal pitch presentations.** Conversations should be informal and informative.

**Zoom Option Use:**

* Required for agencies requesting $5,000 or less
* Used for agencies without a physical service site (e.g., mobile programs like WATTS)
* May be approved by UWNSV in special circumstances (e.g., scheduling limitations)

**Volunteer Prep:**

* Panelists must review applications in advance and prepare questions
* The site visit is the key opportunity to clarify information and assess alignment

**9. Grant Evaluation Criteria**

Volunteers evaluate applications based on the following:

* Alignment with UWNSV focus areas
* Measurable outcomes and indicators
* Program impact and efficiency
* Collaboration with other service providers
* Budget and appropriate use of funds

**Scoring rubrics** are provided to standardize evaluations and guide funding recommendations.

**10. Financial Due Diligence**

All agencies undergo internal financial vetting by UWNSV staff before panel review. This ensures financial accountability so that panelists can focus on program strength, impact, and alignment with community needs.

**11. Final Recommendation Process**

* Panel recommendations are submitted to the Community Investment Committee
* The Committee finalizes a full funding proposal for the Board of Directors
* Approved agencies are notified of awards in June

**12. Support & Follow-Up**

UWNSV staff support volunteers throughout the cycle. Volunteers are encouraged to provide post-cycle feedback to improve the process and may be invited to participate in future grant cycles or impact initiatives.

**Appendix**

* 1. **Sample Financial Report**
	2. **About the 2025–2026 United Way NSV Impact Grant Scoring Rubric**
	3. **Role of the Panel Chair and Group Scoring Rubric**

**Appendix A**

**What the Financial Review Summary Does**

The **Financial Review Summary** provides panelists with a **quick, clear snapshot of each applicant’s financial health and capacity**. It is prepared by United Way NSV staff before panel review and serves three key purposes:

**1. Ensures Financial Accountability**

* Confirms that the organization has appropriate fiscal management practices.
* Flags any financial red flags (e.g., significant deficits, high administrative costs, or inconsistent revenue).
* Verifies that the agency is stable enough to carry out the proposed program if funded.

**2. Allows Panelists to Focus on Program Quality**

* By conducting internal financial vetting in advance, United Way allows volunteers to concentrate on evaluating **program impact, alignment with community needs, and measurable outcomes**, rather than analyzing spreadsheets.
* Volunteers can trust that all applicants have cleared a basic threshold of fiscal responsibility.

**3. Supports Informed Funding Decisions**

* Summarizes key data such as revenue sources, expense breakdowns, and organizational growth trends.
* Offers insight into how the requested funds fit into the larger program and organizational budgets.
* Highlights whether the organization is leveraging other resources or demonstrating sustainability.

**Included in the Financial Review Summary**

Typically, each summary will include:

* Program and organizational budget totals
* Breakdown of revenue sources and expenses
* Year-over-year financial trends (growth or concerns)
* Staffing and administrative structure
* A brief narrative assessment of financial practices and risk level

**Bottom Line:**

The Financial Review Summary is **not a scorecard**, but a **tool** to help volunteers make confident, well-rounded decisions based on both the **strength of the program** and the **organization’s ability to responsibly manage the funds**.

**Sample Financial Review Summary**

**Applicant:** *Valley Roots Collective*
**Program Request:** $20,000 – *Community Harvest Youth Initiative*
**Total Program Budget:** $25,000
**Total Organizational Budget (2025):** $312,500

**Revenue Overview**

* **Projected 2025 Revenue:**
	+ Grants & Government Contracts: $225,000
	+ Individual Donations: $35,000
	+ Corporate Sponsorships: $30,000
	+ Earned Income (Workshops & Events): $22,500
	+ **Total Revenue:** $312,500
* **Revenue Growth:** Valley Roots Collective anticipates a $52,500 increase in revenue over 2023 actuals ($260,000), largely due to new multi-year grants and expanded earned income from educational workshops.

**Expense Overview**

* **Projected 2025 Expenses:**
	+ Personnel (3 FTEs): $246,000
	+ Program Supplies & Materials: $18,000
	+ Administrative & Operational Costs: $28,000
	+ Insurance, Licensing & Misc.: $17,000
	+ **Total Expenses:** $309,000
	+ **Projected Net Income:** $3,500
* **Staffing:** The organization operates with 3 full-time employees and leverages over 200 hours annually of volunteer support. Administrative and fundraising expenses represent less than 10% of the total budget.

**Program Alignment & Fiscal Responsibility**

* Valley Roots Collective demonstrates strong alignment with United Way NSV’s *Education* and *Health* priorities through its youth engagement in sustainable agriculture, nutrition education, and mental wellness.
* In 2023, 91% of total expenses were directed to program services. The organization shows steady financial stewardship, transparent budgeting, and plans for diversification through earned income and donor cultivation.

**Recommendation Context**

The $20,000 request will fund youth stipends, garden materials, and facilitation of seasonal programming that connects food systems education with mental health and life skills development. Based on the organization’s track record, responsible fiscal practices, and alignment with United Way’s strategic goals, this investment is recommended as **low-risk** and **community-centered**.

### **Appendix B**

### **About the 2025–2026 United Way NSV Impact Grant Scoring Rubric**

The **United Way of Northern Shenandoah Valley (UWNSV) Impact Grant Scoring Rubric** is designed to provide a fair, transparent, and consistent framework for evaluating nonprofit applications seeking funding through the Community Impact Grant Program. This rubric guides panelists through a comprehensive review of each application based on program strength, alignment with UWNSV priorities, and potential for long-term community impact.

Each panelist will independently score applications across key criteria areas. These scores are then averaged to guide group discussion and inform funding recommendations.

**Scoring Overview**

| **Criteria Area** | **Focus** | **Max Points** |
| --- | --- | --- |
| **Application Narrative** | Clarity and completeness of the program description, services, outcomes, and goals | 10 |
| **Collaboration** | Evidence of meaningful collaboration, including shared **resources** (5 pts) and shared **responsibility** (5 pts) | 10 |
| **Program Impact** | Clarity of the problem addressed, sustainability, alignment with UWNSV priorities, and measurable impact | 30 |
| **Outcomes** | Use of data to measure progress, clarity of outcome structure (initial, intermediate, long-term), and consistency in tracking | 25 |
| **Budget** | Responsible budgeting, alignment with program goals, and efficient use of resources | 5 |
| **Agency Visit** | Site visit impressions and how well the agency articulated its proposal during discussion | 10 |
| **Agency Presentation** | Clarity of program explanation, outcome measures, and responsiveness to questions during the presentation | 10 |
| **Total Possible Points** |  | **100** |

**Scoring Notes & Expectations**

* Each panelist will assign scores from 0 (not addressed) to the maximum value indicated for each criterion.
* Averages across panelists help ensure balanced evaluation and reduce individual bias.
* Applications do not need a perfect score to receive funding; however, higher scores indicate greater readiness, alignment, and impact potential.
* The scoring rubric supports—not replaces—panel discussion. Panelists are encouraged to discuss variances and come to a consensus on grant recommendations.

**Final Recommendations**

At the end of the scoring process, panelists are asked to:

* Recommend a grant amount (may be full, partial, or none based on application quality and available funding).
* Provide written justification for funding recommendations, including notes on program strengths, concerns, and alignment with community priorities.

This rubric reflects UWNSV’s commitment to **equity, transparency, and accountability** in the funding process. Panelists are reminded to evaluate each proposal on its own merit while also considering the broader funding landscape and needs of the region.



**Appendix C**

**Role of the Panel Chair**

**United Way NSV Impact Grant Review Process (2025–2026)**

Each grant review panel is led by a **Panel Chair**, a key volunteer who helps ensure that the review process is fair, organized, and consistent. The Panel Chair acts as a facilitator, communicator, and process guide for the panel.

**Primary Responsibilities:**

1. **Coordinate Panel Meetings and Site Visits**
	* Work with United Way staff to schedule panel meetings, agency presentations, and site visits (in person or virtual).
	* Ensure all panelists have access to necessary materials (applications, scoring rubrics, calendars, etc.).
2. **Facilitate Group Discussion**
	* Lead panel discussions in a respectful, inclusive manner.
	* Encourage full participation from all members and guide dialogue around program quality, alignment, and impact.
	* Help manage differences of opinion and ensure evaluations remain constructive and focused.
3. **Ensure Consistent Use of the Rubric**
	* Clarify questions panelists may have about scoring categories.
	* Help ensure a shared understanding of criteria and maintain consistency in evaluation across agencies.
4. **Submit Final Recommendations**
	* Collect or verify final scores and funding recommendations from the panel.
	* Work with staff to ensure that documentation is complete and accurately reflects the panel's consensus.
	* Provide a brief summary of the panel’s rationale for funding decisions.
5. **Report Concerns to UWNSV Staff**
	* Notify staff of any major concerns (e.g., conflicts of interest, problematic site visits, missing information).
	* Serve as a liaison between the panel and United Way staff throughout the review period.
6. **Support a Positive Volunteer Experience**
	* Serve as the go-to contact for panelists with logistical or process questions.
	* Help create a welcoming, organized, and mission-driven environment for panel participation.

**Ideal Traits of a Panel Chair:**

* Organized and dependable
* Skilled in facilitating group discussion
* Respectful of diverse viewpoints
* Comfortable with light leadership responsibilities
* Familiar with United Way’s mission and community impact priorities

