

**POSITION:**            **VISITING ALLOCATION TEAM MEMBER**

**REPORTS TO:**        **Allocation Team Chair**

**ROLE SUMMARY:**

Members of the Visiting Allocation Team comprise an important element of a partnership that includes the agencies, the community, and United Way. Members review request from United Way partners and meet with representatives of each agency. The team members caucus after each visit to discuss their perceptions of the agency and the services provided. The Chair of the team reports the findings and impressions of the team to a central allocations committee. The committee uses this information in making funding recommendations based on community need, community impact and available funds.

**Duties Include:**

- Attend an orientation (new members only).
- Attend VAT first meeting and read agency materials to prepare for the process.
- Learn about the agency, its clients, its mission and programs. Discover the impact the agency has on the client and community.
- Attend and actively participate in agency site visits in order to understand the perspective of agency volunteers and staff.
- Understand the difference between a governing board, which establishes policy, and staff, who work directly with budgets and programs.
- Keep in mind the needs of the community when reviewing agency services and the program budget requests. Screen out personal biases in order to make objective judgments based on meeting community needs.
- Determine the benefits the program provides to address community issues.
- Keep materials, findings, and matters discussed *confidential*.

Time Requirement – Approximately 8 – 10 hours including training, travel, team meetings and agency visits over a 3-month period of time.

Volunteer Requirements - Volunteers should be willing to look at programs from a community perspective and to share their viewpoint with team members. Volunteers should be committed to meeting community needs by effectively allocating funds to agencies.

Conflict of Interest - Persons associated with an agency receiving or seeking United Way funding should disclose this to staff or the team chair. United Way will attempt to place volunteers on a team not dealing with an agency with which they are associated.

Volunteer Benefits - Volunteers will learn about human service programs, community needs and how United Way contributions are meeting these needs. Each volunteer will have the opportunity to meet, work with and get to know other concerned community leaders, volunteers and service providers. This process is designed to help volunteers gain experience in community and group decision-making processes.