

**WARREN COUNTY UNITED WAY
ALLOCATION COMMITTEE
GUIDELINES FOR WORKING WITH AGENCIES**

1. Role:

- a. The focus group member's primary role is to become fully familiar with the assigned agency and its programs, and should always view the agency's activities as objectively as possible. He/she should not act as an agency advocate but as a representative of the Warren County United Way and the investors it represents.
- b. The focus group members are representatives of the Warren County United Way and shall at no time act as a voting or participating member of any committee or board of the agency.
- c. The focus group members should be cautious not to give opinions, advice, or make commitments to the agency in matters that require allocation committee or Warren County United Way Board of Directors approval; such matters should be referred to the full committee for action.

2. Process of Assignment:

- a. Focus group assignments are made at the suggestion of the focus group chairperson allowing the volunteers to discuss and modify such assignments where appropriate.
- b. Agencies are notified by mail of their assigned visiting team members, with copies mailed to the respective focus group members.
- c. It is recommended that not less than two focus group members be assigned to each agency. These two members should coordinate activities.
- d. Agency focus group assignments should be rotated so that each focus group member has the opportunity to be thoroughly acquainted with more than one agency within their focus group.

3. Basis of Assignment:

- a. Volunteer is not presently associated with the organization in any formalized manner i.e. no conflict of interest.
- b. Has approval of focus group Chairman.

4. Initial Contact:

- a. The focus group member's initial contact with the agency should be arranged through the Executive Director to discuss and clarify the ongoing relationships between the focus group member and the agency.

5. Involvement:

- a. You are encouraged to seek permission to attend agency board meetings and other agency's committee meetings, as appropriate, but remember that **you are simply a silent observer**. You are dealing with an autonomous organization and should not take **any** part whatsoever in their deliberations or proceedings. You may attend agency meetings only as an invited guest, and should be guided accordingly. You may, of course, respond to specific questions about the Warren County United Way, if you are confident you know the answer, but if not, simply indicate that you will check it out and respond as soon as possible.
- b. Visits to the agency to observe activities and programs in progress are strongly encouraged.
- c. A focus group member may ask the agency to include him/her on the agency's mailing list (e.g. calendar of events), so that he/she can be aware of and when appropriate, attend activities.
- d. Focus group members should work closely with their focus group chairperson in visits to the agency.
- e. The focus group members are encouraged to alert the Executive Director of the assigned agency of each intended visit in order to insure a pleasant ongoing relationship with the agency. This practice should be followed unless a standing invitation has been issued to the focus group member.
- f. Focus group members will visit the agency. **(Agency Directors should have completed and returned their questionnaire in advance of the focus group member's visit and a copy is provided to the volunteers. If the questionnaire has not yet been returned the Agency Director should have it completed and provide two copies to the visiting focus group member).** This questionnaire, along with the Evaluation Forms **(completed by visiting volunteers)** should be submitted promptly thereafter to the United Way Allocation Director for distribution to the full focus group.
- g. When practical and appropriate, the United Way Allocation Director may accompany focus group members in his/her visits to the agency or the

volunteer may request staff advice or support in situations requiring technical and professional expertise.

- h. If problems arise in the relationship between a focus group member and the agency, the United Way Allocation Director and the Allocation Committee Chairman should be contacted.
- i. The focus group members are responsible for reporting their agency activities back to the Allocation focus group.