

UNITED WAY OF GREATER LAFAYETTE COMMUNITY INVESTMENT GUIDELINES

LIVE UNITED®

Investment Guidelines were established to help the Community Investment Committee (CIC) carefully assess each United Way partnership to determine whether an agency has demonstrated alignment to United Way of Greater Lafayette's strategic goals, provides measurable program data, and demonstrates fiscal stability. With these guidelines as the basis for funding decisions, volunteers can ensure donors that their contributed dollars are well-spent.

1. STRATEGIC ALIGNMENT

- Does the agency's mission and programming align with the United Way Cradle to Career Continuum and Basic Foundational Needs? If not, what is the justification for continued funding?
- What percentage of those being served are low income or at risk populations?

2. DUPLICATION OF SERVICES

- Is the agency providing unduplicated services? If yes, how do they know they are not duplicating services or if duplication of services is being provided what is the reasoning for the duplication (i.e. serving a specific population or geographic location, etc.)?
- What are they doing to address potential duplication?

3. COLLABORATION

- How does the agency collaborate with other organizations in the community? Provide information on partnerships with other UW agencies, faith-based organizations, other community non-profits, government agencies, local companies, schools, etc.

4. MEASURABLE OUTCOMES

- What program outcomes/metrics are being measured by the agency?
- Are metrics being used to chart improvements on a regular basis (weekly, monthly, or yearly)?
- Do these outcomes align with United Way's targeted community outcomes and indicators?

5. FINANCIAL CONDITION

- Does the agency have a history of positive financial records? Are there any financial concerns?
- Have they fulfilled all document requirements (i.e. Most recent audit, 990, etc.)?
- Have appropriate steps been taken to secure a sustainable financial future?
- Can ROI, % of budget, cost per participant be measured?

6. BOARD GOVERNANCE

- Are board members trained and engaged in fundraising and oversight?
- Does the board meet regularly and consistently?

