

## Multi-Year Funding Policy

**Purpose:** Create a multi-year funding process that is mutually beneficial to United Way Staff and volunteers, and United Way Partner Agencies (grantees).

### Benefits:

1. Increase time towards community needs research, community goal development, other strategic initiatives, and fundraising
2. Reduced volume of paperwork at all levels of the community investment process
3. Provide an added incentive for all partner agencies to improve program quality and outcomes

### Multi-Year Funding Process (2016/2017 Cycle):

- River Valley United Way implemented a two-year funding cycle in 2013
  - The fiscal year remains unchanged (Jan 1 – Dec 31)
- All current partner programs may be eligible for multi-year funding.
  - There are no base funding guarantees for any program currently funded. Previous grant amounts are not considered when making future funding decisions.
- New program applications will be accepted on the first year of the multi-year funding cycle
- Program Funding Criteria:
  - The program aligns with and addresses the community investment priorities established by RVUW.
  - The program has an organizational history of strong performance and demonstrates the ability to achieve positive results for the people it serves.
  - The program demonstrates progress towards achieving their stated outcomes.
  - The program demonstrates the ability and willingness to learn, adapt and collaborate with other organizations so as to achieve a greater community impact
  - The program demonstrates sound fiscal stewardship and an effective use of program resources to achieve their desired results.
- Multi-Year funding requests are reviewed by the Community Investment Committee, with funding recommendations for Year 1 sent to the Board of Directors for final approval.
  - Investment teams have the option of scheduling a program site visit prior to their deliberations for funding recommendations
  - Investment teams have the option of recommending:
    - Two year commitment for funding
    - One year commitment for funding based on concerns about a programs performance, alignment, or financial viability. A second year of funding would only come after a separate review of program is completed. This review would take place prior to second funding cycle period.
    - *No funding* for programs assessed as not fully meeting program funding criteria.
- Funding recommendations will place programs in one of three “funding tracks” based on available funds
  - Growth
  - Continued support
  - Reduced support
- Changes in funding for each of these tracks will be determined after the completion of the campaign and will be contingent upon the amount of available resources and how well the programs are performing relative to their targeted outcomes. If there are fewer resources available to support the programs in 2017, programs in the strongest tracks will experience either limited increase or the smallest reduction in funding.
- All funded programs will submit the following documents:
  - Year 1 Progress Reports
  - Financial documents
- RVUW retains the right to end the multi-year funding agreement at any time as outlined in the United Way Policies and Procedure Manual, Termination of United Way Relationship Policy.