

Community Investment Review Strategy

What guides our decisions?

Should United Way consider this investment opportunity?	Community Impact priorities
Community need and gaps	Duplication/complementary services
Portfolio alignment	Proposed use of United Way funds

Integrity, good stewardship, and community priorities guide our funding decisions.

How do we ensure a fair, consistent, and impartial review process?

- Evaluate the substance of the proposal, not the sophistication of the applicant's grant writing.
- Apply the same criteria and information requirements to all applicants.
- Do not use organizational size, reputation, prior United Way funding, or familiarity as indicators of program quality.
- Evaluate capacity and proposed outcomes in proportion to the size and scope of the program.
- Before the November meeting, CIC members will receive a new applicant list to disclose conflicts of interest, which will be recorded in the meeting notes.
- Staff will assign three reviewers to each eligible LOI in consultation with the Committee Chair and members, balancing relevant experience, varied perspectives, and workload. Members with disclosed conflicts will not review that applicant nor contribute to relevant discussions concerning advancement.

How is the Letter of Intent Reviewed?

Evaluation Area	CIC Review Question	What Reviewers Should Consider
1. Community Need & Population	Does the LOI clearly demonstrate a community need or service gap and identify who will benefit?	Is the need clear, relevant, and supported by local context, with the population clearly defined?
2. Community Impact Alignment	Does the program clearly align with the selected Community Impact Fund priority and outcomes?	Is there a clear connection between the program, selected Impact Area, and intended outcomes?
3. Program Response & Community Fit	Does the program reasonably address the need and complement or fill a gap in existing services?	Do the activities address the identified need and add value to existing community services?
4. Potential for Measurable Outcomes	Does the program identify meaningful, measurable changes for participants?	Are the expected changes meaningful, connected to services, and reasonably measurable?
5. Funding Request & Proposed Use	Is the funding request clear and connected to the program's activities and intended outcomes?	Is it clear what United Way would fund and how the request supports program delivery?
6. Overall Investment Consideration	Does the proposal demonstrate sufficient need, alignment, impact, and value to warrant a full application?	Does the proposal provide enough value and potential to warrant further consideration?