CRP Volunteer Guide

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APPLICATION REVIEW TIPS

- If you prefer to review all materials in chronological order, access the application files through Dropbox.

- You can use the "Table of Contents" sidebar in the Agency Application .pdf file (available through Dropbox) to easily navigate to the section you wish to review.

- When viewing financial information through Dropbox, you will only see one fiscal year displayed at a time. If you view financial information through the reference materials associated with evaluation questions in Andar, you are able to access a 3-year comparison of financial information on one page.

- When viewing financial schedules in Andar, click on the red text that says **Comment** at the bottom of the column for each fiscal year to view any notes the agency has included i.e. explanation of variances between fiscal years, surplus / deficit explanations, etc.

2600	Special Events	Expense	$0.00	$0.00	$0.00
2700	Other Expenses	Expense	$0.00	$0.00	$0.00
		Income	$1,200.00	$0.00	$0.00
		Expense	$7,000.00	$0.00	$0.00
		Surplus/Deficit	($5,800.00)	$0.00	$0.00
			Comment	Comment	Comment

- Make sure to note whether you are viewing an agency-level or a program-level financial schedule as reference materials in Andar. The scope of the financial information you are viewing is noted at the top of the columns representing each fiscal year.

Budgets

Line	Description	Side	2016	2017	2018
			Primary	Primary	Primary
			Actual	Revised	Proposed
			Agency Total	Agency Total	Agency Total
100	Government - Federal	Income	$200.00	$0.00	$0.00
200	Government - Provincial	Income	$500.00	$0.00	$0.00
300	Government - Municipal	Income	$500.00	$0.00	$0.00

- Questions 1-6 of the evaluation refer to agency-level information. Questions 7-12 are in reference to program-level information. If one or both of the agencies you are reviewing has multiple United Way funded programs, you will need to repeat your answers for questions 1-6 in the evaluation form for each program.

LOGGING IN

Please note that the online portal is most compatible with **Internet Explorer**.

You will receive an email containing a special link for the first time you access Andar. This link will automatically sign you into your account and prompt you to set a password. Your username is the email address at which you received the link to access Andar.

After logging in for the first time using the link in the email, use the following link to access your account:

https://andarweb.unitedwaykfla.ca/crm/Start.jsp

Enter your user ID and password into the appropriate fields and click **Login**. If you have forgotten your credentials, click **Forgot User ID or Password?**

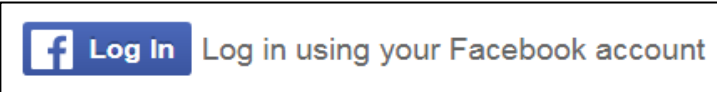For information on our United Way, please visit: www.unitedwaykfla.ca

User ID:

Password:

f **Log In** Log in using your Facebook account

If you have problems logging in, please contact John DiPaolo at: jdipaolo@unitedwaykfla.ca or call our offices at 613-542-2674.

Login   Forgot User ID or Password?

Alternately, you can click the Facebook icon to log in using your Facebook account.

f **Log In** Log in using your Facebook account

To activate this feature, you will need to link your Facebook account with your United Way account. This is one-time setup per browser.

If you have problems logging in, please contact John DiPaolo at: jdipaolo@unitedwaykfla.ca, or call our offices at 613-542-2674.

HOME PAGE

After you login, you will be able to see the home page. Use the menu bar at the top of the screen to navigate between sections.
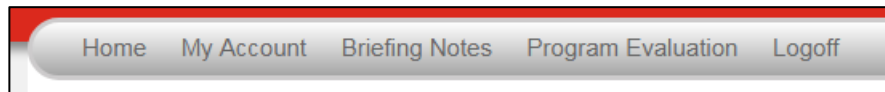
- The **Home** button will return you to the home page.

- **My Account** allows you to maintain your personal information.

- The **Briefing Notes** section includes agency briefing notes and may contain additional information available for download.

- The **Program Evaluation** tab will bring you to the evaluation surveys and associated reference materials for each program you are assigned to.

- Click on **Logoff** to end your session.

*Please note that if the menu bar does not appear at the top of your browser, you may need to adjust your zoom settings (ctrl +/-). Alternately, you can click the icon in the top left corner to expand the menu within your current view settings.

Home
My Account
Briefing Notes
Program Evaluation
Reports
Logoff
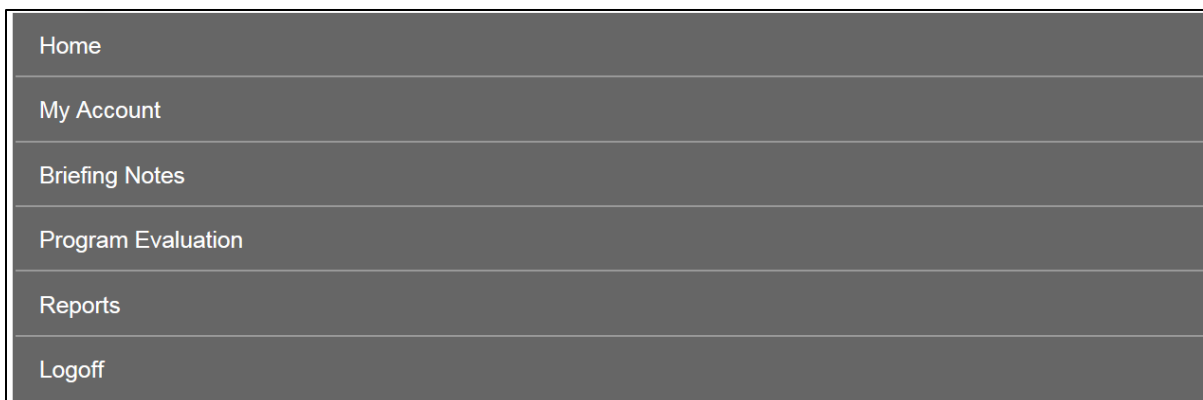
MY ACCOUNT SECTION

This section is used to maintain your personal information.

Once you have reviewed and updated your information, click the **Save** button.

BRIEFING NOTES SECTION

In this section you can download agency briefing notes and any additional documents for your review (i.e. agency strategic plan, fundraising plan, etc.).

Click on the file name to download each document.

		File Name	Description	Effective	Expiry
		B&G Club - Briefing Notes.doc	Briefing note		

PROGRAM EVALUATION SECTION

This section allows you to rate each program you are assigned to. **Each evaluation question is linked to the funding criteria in the Community Investment Strategy document (pages 12-14).**

To begin, choose the program you would like to start with from the file tree. Please note that if you have been assigned to an agency with multiple United Way funded programs, you will be asked to complete an evaluation for each program.

2018 / IMPACT AREAS
Test Agency / test (Program - Complete)
Test Agency / Test Program 2 (Program - Complete)

Once you have selected a program, you can begin your review and evaluation. You can navigate between questions using the dropdown menu or the forward / back arrows. Questions are organized according to subject headings (i.e. Governance, Operations, Strategy, etc.).

Select Question

3. Sustainability

The agency demonstrates strong performance in the areas of fundraising and sustainability.

Rating: 2 - Satisfactory

Note: The agency was requested to submit a fundraising plan. This was not received by UW. The agency has improved in reducing its reliance on UW funding.

Review

Update

Submit

After all programs are completed, click submit

You can view the information associated with each question in the full agency application (provided through Dropbox) or within the Andar evaluation itself to view only those materials that are related to the question. These are labelled as **Reference Materials** in Andar, and are located underneath each evaluation question. Reference materials may include forms, financial schedules, outcome and indicator information, program statistics, etc.

Reference Materials:

Form: 2018 / Fundraising and Sustainability

1. **Donor Relations**

Does the agency have a policy on:

How to honour donors' and prospective donors' requests?

◉ Yes ○ No

How it handles its donor list?

◉ Yes ○ No

Requests by donors to remain anonymous?

◉ Yes ○ No

2. **Fundraising Practices**

Does the agency have:

A fundraising Code of Ethics?

Rate the agency / program according to the criteria in the Community Investment Strategy for each of the 12 questions. Select your rating between 1 and 3 using the dropdown menu.

1 = Needs Improvement

2 = Satisfactory

3 = Excellent

If you have given an agency or program a rating of 1 or 2, please use the **Note** textbox to make comments and provide rationale to identify areas for improvement.

Note: The agency was requested to submit a fundraising plan. This was not received by UW. The agency has improved in reducing its reliance on UW funding.
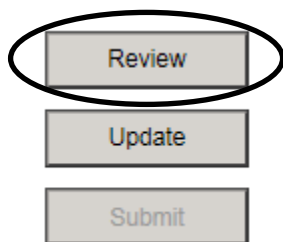
Use the **Update** button to save your information.

Review

Update

Submit

Use the **Review** button for an overview of the ratings you have entered. A new window will open with a summary of your ratings and comments. Press **Ctrl P** to open a print system dialogue box and print a copy of your evaluation summary.

Review

Update

Submit

test program	
Question#1	The agency demonstrates effective Board governance and oversight.
Rating:	3 - Excellent
Note:	The agency demonstrates sound board governance. No concerns.
Question#2	The agency demonstrates a high degree of financial accountability and transparency.
Rating:	3 - Excellent
Note:	The agency posts their audit on their website and is highly accountable to funders.
Question#3	The agency demonstrates strong performance in the areas of fundraising and sustainability.
Rating:	2 - Satisfactory
Note:	The agency was requested to submit a fundraising plan. This was not received by UW. The agency has improved in reducing its reliance on UW funding.
Question#4	The agency demonstrates proficiency in its operations and staff management.
Rating:	3 - Excellent
Note:	No concerns re: Operations and staff management. The agency consistently achieves targets with lean resources.
Question#5	The agency has defined processes for volunteer involvement, if applicable to the services being provided.

Once you have entered and reviewed your ratings for **all programs**, and are satisfied with your answers and comments, click the **Submit** button to send your evaluations to United Way staff.

Review

Update
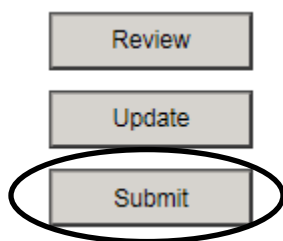
Submit

If you submit your evaluations in error, please contact Mel Côté at program@unitedwaykfla.ca or 613-542-2674 ext. 1504 to regain access.

DROPBOX ACCESS INSTRUCTIONS

The following are instructions to access and save the files for the agencies you are reviewing through Dropbox:

1. **<u>Before you get started</u>**, it's a good idea to **create a folder for each of your agencies on your computer's desktop** for the applications you will be reviewing, called (for example) "Canadian Hearing Society"

2. You will receive a link to the files for your panel via email. Click on the link and enter your password to access the files. You can receive your password by phone at 613-542-2674 ext 1504, if you haven't already done so.

3. You will see each of the agencies in your panel listed in alphabetical order. Click the icon with 3 dots (…) next to one of the agencies you will be reviewing and click **Download**. This will download the entire contents of the agency folder.

4. At the bottom left of your screen, click the **".zip"** download that is titled according to agency. (If you are asked to "Open," "Save" or "Cancel" – select "Open")

   - You will see your agency's subfolders and files containing all required documentation.

5. Click once on the first item, then **press** and **hold the Shift key** while selecting the remaining items (i.e. select all).

6. Right click and select **Copy.**

7. Minimize your internet browser, go to your desktop to the folder you created and right click, select **Paste** to save the files.

8. The files will be saved on your computer.

Should you have any difficulty accessing files, please call Mel Côté at 613-542-2674 ext. 1504 or Marg Kubalak at ext. 1503.

For those who already use Dropbox as an application on your computer, use Dropbox as you normally would.