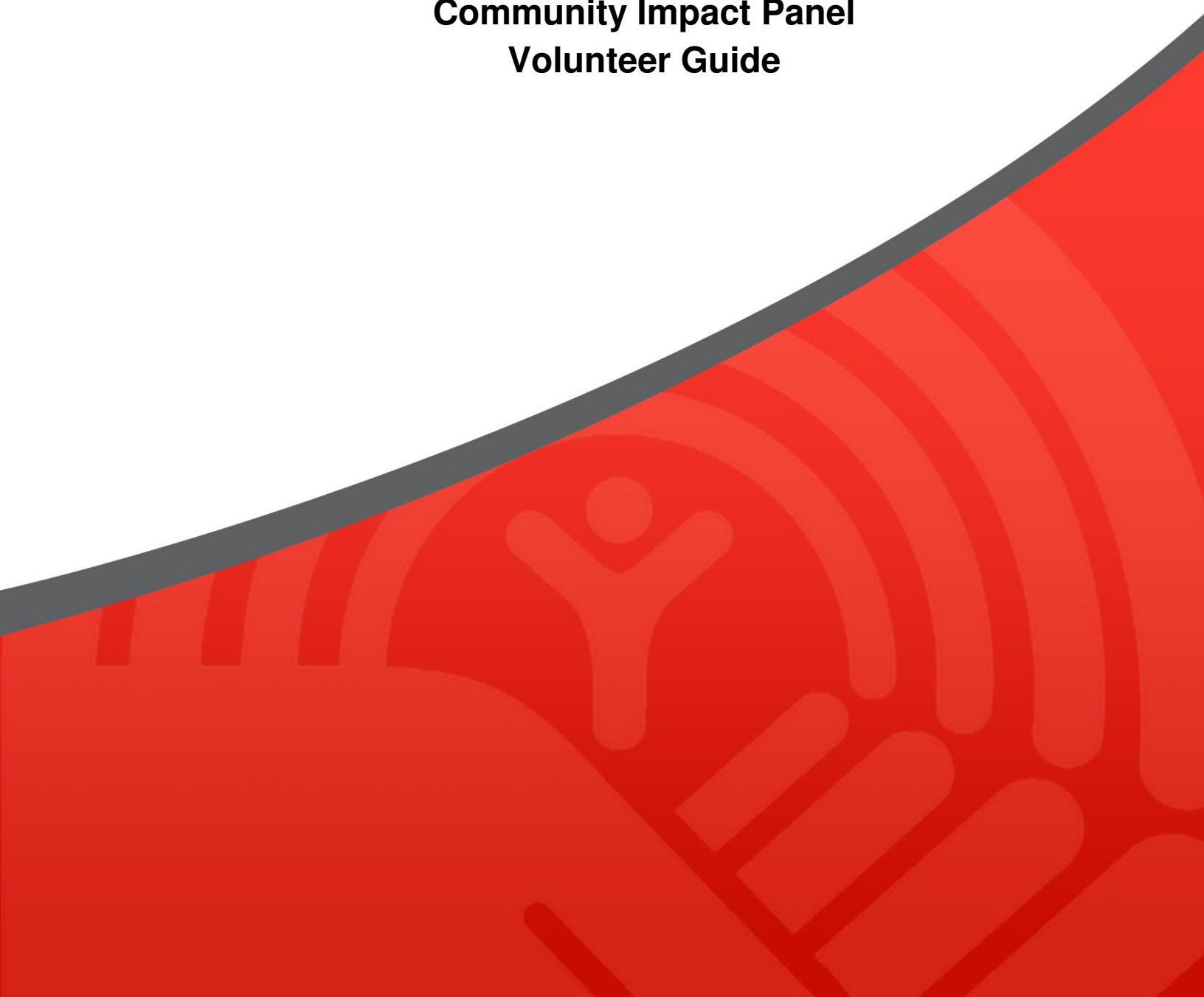




**United Way**  
Kingston, Frontenac  
Lennox and Addington

# **Community Impact Panel Volunteer Guide**



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## APPLICATION REVIEW TIPS

- If you prefer to review all materials in sequential 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
			<b>Comment</b>	<b>Comment</b>	<b>Comment</b>

- Only agency-level financial information is available in Andar. For program-level financials, you need to review the uploaded Schedules A (audit year), B (current year) and C (2021).

The budget for the program(s) that are requesting United Way funding will be highlighted on Schedule C.

- For agency-level financials, Andar will display 3 years of information with the year shown at the top of the column..

### Budgets

Line	Description	Side	2018	2019	2020
			Primary	Primary	Primary
			Actual	Revised	Proposed
			Agency Total	Agency Total	Agency Total
100	Government - Federal	Income	\$40,047.00	\$0.00	\$0.00
200	Government - Provincial	Income	\$575,977.00	\$694,820.00	\$694,820.00
300	Government - Municipal	Income	\$0.00	\$0.00	\$0.00

- Questions 1-6 of the evaluation refer to agency-level information.
- Questions 7-11 are in reference to program-level information.

## **LOGGING IN**


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

You will receive an email containing a special link 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](http://www.unitedwaykfla.ca)

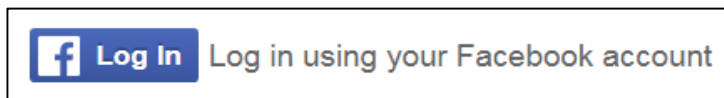
User ID:

Password:

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

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

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

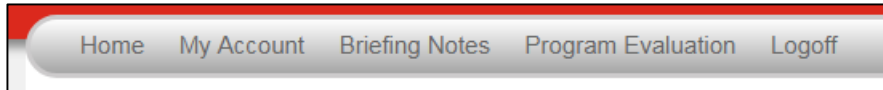


To activate this feature, you will need to link your Facebook account with your United Way account. This is one-time setup per browser.

If you have problems logging in, please contact Nish Panag at: [database@unitedwaykfla.ca](mailto:database@unitedwaykfla.ca) or call our offices at 613-542-2674.

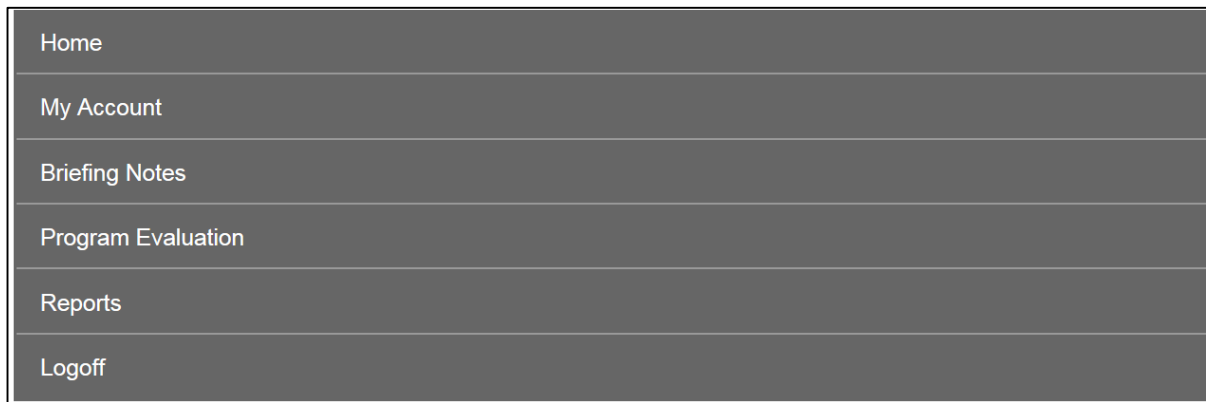
## HOME PAGE

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 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.



## MY ACCOUNT SECTION

This section is used to maintain your personal information.

### Profile

**\*Name**

Salutation

First

Middle

Last

Suffix

Gender

Individual Work e-Mail

Individual Work Phone

Area	Number	Ext
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Cell Phone

Area	Number
<input type="text" value="0"/>	<input type="text" value="0"/>

User ID

Password


Items marked with an asterisk (\*) are required

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
		<a href="#">R&amp;G Club - Briefing Notes.doc</a>	Briefing note		

## PROGRAM EVALUATION SECTION

This section allows you to rate each of your assigned programs. **Each evaluation question is linked to the funding criteria in the Community Investment Strategy document (pages 14-16).**

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.

2020/2020 IMPACT AREA

- [Canadian Hearing Society / Employment Services \(Program - Incomplete\)](#)
- [Canadian Hearing Society / General Support Services \(Program - Incomplete\)](#)
- [Canadian Hearing Society / Hearing Care Counselling \(Program - Incomplete\)](#)

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 11 questions. Select your rating between 1 and 5 using the dropdown menu.

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Neither Agree nor Disagree
- 4 = Agree
- 5 = Strongly Agree

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 strategic plan. This was not received by UW.**

Use the **Update** button to save your information.

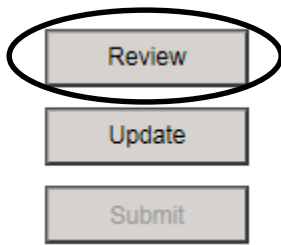
Review

**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.



test program	
Question#1	The agency demonstrates effective Board governance and oversight.
Rating:	5 - Strongly Agree
Note:	The agency demonstrates sound board governance. No concerns.
Question#2	The agency demonstrates a high degree of financial accountability and transparency.
Rating:	4 - Agree
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:	3 - Neither agree nor disagree
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:	5 - Strongly Agree
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.

Click on the **Survey** button to enter your program funding recommendation (total \$ recommended).

**Volunteer Funding Recommendations**

**Program**

Employment Services

**Program funding recommendation: \***

On this screen, you will also have the opportunity to provide any **Conditions** to funding, **Recommendations** to funding, or **Suggestions** for improvements, if applicable.

Please provide the following:

Conditions to funding, if any:

Recommendations to funding, if any:

Suggestions for improvements, if any:

Click the **Save** button to save your funding recommendations.

Once you have entered and reviewed your ratings and funding recommendations for **all programs**, and are satisfied with your answers and comments, click the **Submit** button to finalize your evaluations.



If you submit your evaluations in error, please contact Sophie Lachapelle at [program@unitedwaykfla.ca](mailto:program@unitedwaykfla.ca) or 613-542-2674 ext. 1504 to regain access.

<b>Evaluation Contents</b>	
<b>Survey Question</b>	<b>Associated Online Reference Materials</b>
1. Governance The agency demonstrates effective Board governance and oversight.	<ul style="list-style-type: none"> <li>• Agency Information form</li> <li>• Governance form</li> </ul>
2. Accountability The agency demonstrates a high degree of financial accountability and transparency.	<ul style="list-style-type: none"> <li>• Financial Accountability and Transparency form</li> <li>• Audited Financial Statements (download)</li> <li>• 3-year comparison of agency-level financial information</li> <li>• Budget Notes form</li> <li>• Agency Reserves Questionnaire form</li> </ul>
3. Sustainability The agency demonstrates strong performance in the areas of fundraising and sustainability.	<ul style="list-style-type: none"> <li>• Fundraising and Sustainability form</li> <li>• Agency Fundraising (2021 form)</li> </ul>
4. Operations The agency demonstrates proficiency in its operations and staff management.	<ul style="list-style-type: none"> <li>• Operations and Management form</li> <li>• Agency Programs form</li> </ul>
5. Volunteers The agency has defined processes for volunteer involvement, if applicable to the services being provided.	<ul style="list-style-type: none"> <li>• Volunteer Involvement form</li> <li>• Program Inputs/Resources form</li> </ul>
6. Support of UW Support of United Way is clearly demonstrated.	<ul style="list-style-type: none"> <li>• Support of United Way form</li> </ul>
7. Community Need The agency has used evidence (consultation and/or local data) to determine program strategies.	<ul style="list-style-type: none"> <li>• Program Funding Request form</li> <li>• Program Details form</li> </ul>
8. Deliverables The program has the ability to meet identified deliverables and outcomes.	<ul style="list-style-type: none"> <li>• Program Details form</li> <li>• Outcomes for 2021 (outcomes targets)</li> <li>• 2021 Statistics Information</li> <li>•</li> </ul>
9. Strategy Where possible, prevention is addressed to bring about positive changes in clients when they are ready for change. Goals are realistic; immediate needs are met	<ul style="list-style-type: none"> <li>• Program Details form</li> <li>• Outcomes for 2021 (outcomes targets)</li> </ul>
10. Capacity The agency has the organizational capacity and ability to deliver the proposed program.	<ul style="list-style-type: none"> <li>• Program Funding Request form</li> <li>• Program Inputs/Resources form</li> <li>• Program Partnerships form</li> <li>• 3-year comparison of agency-level financial information</li> <li>• Annual Report (download)</li> </ul>
11. UW Investment The agency demonstrates a need for United Way funds for the delivery of the program. Agency understands that United Way funding is not guaranteed.	<ul style="list-style-type: none"> <li>• Program Funding Request form</li> <li>• Program Details form</li> <li>• 3-year comparison of agency-level financial information</li> <li>• 2019 Schedule A – Agency by Programs (download)</li> <li>• 2020 Schedule B – Agency by Programs (download)</li> <li>• 2021 Schedule C – Agency by Programs (download)</li> </ul>

## **DROPBOX ACCESS INSTRUCTIONS**

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

1. **Before you get started**, 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 Sophie Lachapelle 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.

## **DROPBOX CONTENTS**

- I. Application (folder)**
  1. 2021 Application (*order of contents on p.2*)
- II. Financials (folder)**
  1. Audited Financial Statements
  2. Financial Schedule A – audit year by program
  3. Financial Schedule B – current year by program
  4. Financial Schedule C – proposed year by program
- III. Uploads (folder)**
  1. Annual Report
  2. Any additional documents i.e. Strategic Plan, Risk Management Plan, etc.
- IV. Agency Briefing Notes (file)**

*Order of contents in the document “2021 Application”:*

### **Agency Information**

- Agency Information Summary
- Board Governance
- Financial Accountability & Transparency
- Fundraising and Sustainability
- Operations and Management
- Volunteer Involvement
- Support of United Way
- Annual Report (Upload – Refer to attached documents)
- Agency Programs
- 2019 Audited Financial Statements (Upload – Refer to attached documents)
- 2019 Agency Audit Year (financial schedule)
- 2019 Schedule A – Agency by Programs (Upload – Refer to attached documents)
- 2020 Agency Current Year (financial schedule)
- 2020 Schedule B – Agency by Programs (Upload – Refer to attached documents)
- 2021 Agency Draft Budget Year (financial schedule)
- 2021 Schedule C – Agency by Programs (Upload – Refer to attached documents)
- Budget Notes
- 2021 Agency Fundraising Projects and Activities
- Agency Reserves Questionnaire
- Document Upload Completion Checklist

## **Program Information *(to be completed for each program)***

- Program Funding Request
- Program Details
- 2021 Statistical Information
- Program Inputs and Resources
- Program Partnerships
- 2021 Outcomes Target
- 2021 Indicators Target

## **Application Review**

### **Step 1 - Access Application**

- Dropbox and Andar – you will have access to both
- Review content in Dropbox for the 2 agencies you are assigned to
- You can also review via Andar through Program Evaluation
- Briefing Notes provide additional information

### **Step 2 - Read / Review on your own**

- May be easier to review Dropbox file first

### **Step 3 - Site Visit - All site visits will be conducted via Zoom**

- Site visit scheduling (with your availability)
  - You will receive an email with a doodle poll based on the availability you provided in advance
  - Once the poll is complete, a time will be selected by UW staff that works for all parties. You will receive a confirmation email and an invite for your calendar
- Site visits
  - Pre-visit discussion scheduled for a time immediately prior to visiting the agency

### **Step 4 - Agency and Program Evaluation (rating)**

- Evaluations are completed online
- Refer to the CIP Volunteer Guide for additional information about the online portal
- Volunteers rate each program individually, not by consensus
- Survey questions – criteria outlined in CI Strategy document
  - Apply a rating scale for each of the 11 questions, each rated on a scale of 1-5. This is a response to the statement in the evaluation. For example, “The agency demonstrates effective board governance and oversight”

#### Rating

- 1 = Strongly Disagree
- 2 = Disagree
- 3 = Neither Agree nor Disagree
- 4 = Agree
- 5 = Strongly Agree

- If you give a rating of 1 or 2, provide brief rationale in the comment box
- Evaluations are not required to be submitted until after your site visit, but can be completed at any time

- Once you press the “Submit” button, your answers are locked for editing (call UW if you need to regain access)

### **Step 5 - Report Back Meeting**

- Present your recommendations to your panel
- Discuss each agency and program as a panel
- Come to a consensus on recommendations for each agency and program
- Kinds of recommendations
  - Full funding recommended (no conditions, recommendations, or suggestions)
  - Conditions to funding (conditions must be met in order for funds to be disbursed)
  - Recommendations to funding (strong recommendation to fulfil specific criteria; UW staff will follow-up throughout the year)
  - Suggestions to funding (suggestions to improve agency or program capacity)