



United Way Investment Team Member Volunteer Position Description

Purpose and Goal:

For each key goal there is an Investment Team that meets to make funding recommendations focused on attaining that goal. The goal areas defined by United Way are Basic Needs: Access to Food, Homelessness, and Financial Stability and Education: Early Learning Early Literacy and Quality Out of School Time. Members of this team review all funding applications from area non-profits that apply within that goal and the established outcomes. The Investment Team develops prioritized investment recommendations with rationale for the two-year investment cycle (July 1, 2017 - June 30, 2019).

Primary Responsibilities:

- Review every funding application, provide written scoring/feedback and participate in 2 or 3 Investment Team meetings where full discussion, prioritization and final recommendations are determined.
- Represent the thousands of local people who donate to United Way of Central Minnesota.
- Complete orientation on the responsibilities of the Investment Team volunteers, criteria and process used in developing recommendations.
- Review and sign a Code of Ethics statement that includes communicating any potential conflicts of interest to other team members.

Qualifications:

- Resides and/or works with United Way's service area
- Contributes annually as a donor to United Way of Central Minnesota
- Possesses strong interest in one or more of United Way's goals
- Uses positive communication skills and shares their individual expertise.

Composition:

Each Investment is composed of 8-10 community volunteers. Two volunteers serve as co-chairs and there is also a representative of United Way's year-round Financial Review Committee. The volunteer shares information on audits/financial pictures of each organization.

Time Commitment:

- Orientation & Training (2-3 hours)
- Review and screen each application. It will take approximately 30 minutes per application for review and scoring & feedback. It is estimated there will be approximately 20-25 applications per team.
- Attend & participate in team meetings. There will be 2-3 team meetings that will last approximately 2-3 hours in length.
- Participate in site visits, as schedule permits.

Signature: _____

Date: _____

United Way Key Contact:

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Mission: To improve people's lives by mobilizing the caring power of Central Minnesota.