

5. Annual Review Policy

Policy Number	CI-005
Board Decision	<input checked="" type="checkbox"/> Approved <input type="checkbox"/> Not Approved
Date of Board Action	January 17, 2014
Effective Date	January 17, 2014
Officer Signature & Date	

Introduction

Each year, thousands of area residents entrust United Way of the Greater Chippewa Valley to invest their donations in programs and services that impact the community in a positive way. To ensure this occurs, certain safeguards are in place as outlined in the Affiliation & Funding Requirements Policy. In addition, UWGCV requires each organization to submit an annual progress report.

Policy

An organization that receives grant funding to a specific program or service is considered a “program partner”. Each program partner will submit a progress report each year. United Way staff and volunteers will review each report and recommend future action to the United Way board of directors. Recommendations could include, continuation funding to agency, place agency on probation, defunding of program, defunding of agency.

UWGCV will notify Program Partners minimally 6 weeks in advance of the Annual Progress Report deadline. Special consideration may be given to the submission deadline of financial information such as 990s and audits dependent upon fiscal year end of the submitting organization. Such considerations are on an individual basis and must be in writing to United Way of the Greater Chippewa Valley.

In the event an organization doesn’t meet the report deadline:

- Grant funding to organizations that do not meet the deadline is suspended beginning the first of the month after the Annual Progress Report due date. Funding is reinstated (not retroactively) once a complete report is filed.

Appeals Process

1. **All appeals must be delivered in writing.**
2. If an agency determines that it is not in agreement with United Way’s decision regarding the annual review, the agency may request an appeal within 30 days of the receipt of United Way’s notification letter. **An agency’s lack of awareness of the Annual Review Policy will not be considered grounds for appeal.**
3. The grounds for appeal will be reviewed by the Community Mobilization Committee within 30 days of receipt of written agency request.
4. If the Community Mobilization Committee rules that the appeal does have sufficient merit, United Way will expunge the violation.

5. If the Community Mobilization Committee rules that the appeal *does not have merit*, the agency retains the right to appeal to the United Way Board of Directors within 30 days of notification.
6. If an agency was defunded and the appeal results in a reversal, funding allocations will be reinstated retroactively to the defunding date.