**United Way of the Upper Ohio Valley**

**Agency Allocation Appeal Policy**

**August 13, 2018**

The primary purpose of the United Way of the Upper Ohio Valley is to raise funds in a single annual fund raising campaign to meet the needs of the community with a focus on health, education and financial stability. Funding amounts of the agencies are determined annually by the Board of Directors of the United Way of the Upper Ohio Valley.  This determination is based upon the availability of funds raised and the recommendations rendered by the allocation volunteers. The review includes evaluation of the services provided by each of the agencies of the United Way of the Upper Ohio Valley and how those services meet the needs of the community. The allocation volunteer recommendations for each of the agencies are reviewed by the Executive Allocations Committee and then, after careful consideration, forwarded to the Board of Directors of the United Way of the Upper Ohio Valley for review and approval.

Upon notification of its final allocation amount, an agency may appeal to the United Way of the Upper Ohio Valley for a review and evaluation of the amount of funding approved by the Board of Directors of the United Way of the Upper Ohio Valley. Any appeal will be reviewed based upon the following criteria:

1. **Allocation Appeal Criteria**: (Appeals will be reviewed and evaluated for either of the two basic criteria below to be documented in writing by the United Way agency).

* Financial information of major consequence and impact to the annual budget of the United Way agency was not known by either the United Way agency or by the allocations volunteer committee at the time of the conference between the allocation volunteer committee and the United Way agency.
* A mathematical error of major consequence and impact to the agency allocation amount has been made by the volunteers or the staff of the United Way agency or by the staff of the United Way of the Upper Ohio Valley in preparing or acting upon the allocation request of the United Way agency.

1. **Appeal Procedure:**

* A United Way agency must communicate in writing the specifics of the appeal to the chairpersons of the Executive Allocations Committee and to the chairpersons of specific allocations panel within thirty (30) calendar days from the date of the letter from the United Way of the Upper Ohio Valley providing the final notice to the United Way agency of the annual allocation funding amount.
* Requests for appeal will be reviewed by the chairpersons of the specific allocations panel and by the chairpersons of the Executive Allocations Committee to determine if the appeal from the United Way agency meets the allocation appeal criteria outlined above and is a valid request for appeal.
* If it has been determined that an appeal from a United Way agency has met at least one the allocation appeal criteria, set forth in Section 1 above, the United Way agency will be furnished with the opportunity to present their appeal to the specific allocations panel which conducted the original allocations agency visit/review.
* A recommendation to grant or deny the appeal will be made by the specific allocation panel and the recommendation will be forwarded to the Executive Allocations Committee for review and recommendation.
* The recommendation of the Executive Allocations Committee will be presented to the Board of Directors of the United Way of the Upper Ohio Valley at its next scheduled meeting for final action.

Approved by board action 8/15/18