



United Way  
Thomas Jefferson Area

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## United Way-Thomas Jefferson Area Program Review & Funding Committee “Agency Liaison”

The role of the “agency liaison” in the United Way Program Review & Funding process:

- Delve more deeply into the agency for which you are the liaison, thus better understanding the agency and its program(s) and the application to be reviewed. Focus your review on the outcomes the program(s) is/are attempting to achieve; service delivery to clients; and any challenges the program(s) may be encountering.
- In addition to the agency’s application, the reviewer should study:
  - If applicable, the City/County/United Way site visit report and responses to questions from the City/County Review Team.
  - Any recommendations, conditions, comments attached to their FY06 United Way grant contract.
  - Meet with senior agency personnel to discuss the program(s) seeking funding and the funding application.
- If practical, visit the site where program services are performed and observe the rendering of those services to program beneficiaries.
- The “liaison” will lead the PR&FC review of the application during the discussion period answering many of the questions that will be raised by other PR&FC members. By studying the application and other relevant materials (and making a site visit) the reviewer may anticipate and obtain answers to the major questions that other PR&FC members may ask making the review process more efficient.
- Should the agency’s response to information requested on the application be either unclear or inadequate, the reviewer should ask the agency to clarify their response.

01/08/2009

**United Way-Thomas Jefferson Area  
Program Funding FY10 Applications  
Program Review & Funding Committee (PR&FC)**



*Site Visits*

Before making a site visit with the agency assigned to you, make sure you have thoroughly reviewed the agency's application noting any particular questions you have as a result of this review.

The purpose of the site visit is to become better acquainted with the agency, its mission and its programs and services. The site visit should personalize the work of the agency and help you better understand the funding application and represent the agency to fellow PR&FC members.

Make an appointment with the Executive Director/President of the agency. On your visit, if appropriate, ask for a tour of the organization.

Potential questions you might ask at a site visit but certainly not all questions that might be appropriate:

1. General overview of the organization, mission and programs.
2. Strategies for delivering program(s). Ask specifics about the program(s) for which the agency is seeking funding. Has the program(s) undergone any significant change in the last couple of years? If so, what change?
3. What is being accomplished and for whom by the program(s). What will indicate that accomplishment(s)?
3. What challenges, if any, is the organization experiencing generally and more specifically with the program(s)? What concerns does the Executive Director have about the program(s)?
4. Has a prior PR&FC expressed concerns about the agency or any of its programs? And if so, how has the organization responded?
4. What is the organization most proud of/what's going really well?
5. Perhaps ask for a general profile of a typical client, if there is such.
6. What trends are they seeing with their clients? In the community in general?
7. What would the Executive Director like for us to convey to the PR&FC?