

## Flexible Credit Policy for United Ways Centraides

### Introduction

Flexible credits (also referred to as “flex credits”) are used to encourage United Way Centraide (UWC) staff and volunteers to access and participate in learning opportunities offered through the United Way Worldwide (UWW) network. These learning opportunities seek to strengthen and advance the UWW system and help improve performance. This policy is intended to clarify how Flexible Credits are allocated to assist UWCs in their training and development planning.

### Flexible Credit Eligibility

As the technical member of United Way Worldwide, all flex credits are assigned to UWCC for allocation to the UWC Movement.

UWCs who are in full compliance with UWCC membership standards and current with dues payments are eligible to receive flex credits for use by staff and volunteers.

### How Flex Credits Can Be Used

Eligible UWCs may use flex credits to defray costs registration fees for learning opportunities offered by UWW and UWW approved learning partners. Flex credits will be awarded to fully cover early bird registration fees for a UWW event meeting the criteria below.

Flex credits must be valid in the year that the event takes place or the product is delivered, i.e. expiring credits in one year are not valid for a purchase for an event in a subsequent year. Flex credits may not be used to offset expenses and travel associated with volunteer efforts for the system including system committee meetings, ad hoc advisory groups, user groups or business meetings.

### Approved Learning Opportunities

To use flex credits on non-UWW delivered learning opportunities, UWCC must adhere to the UWW Flexible Credits Policy on Approved Learning Opportunities.

Following this policy, an approved learning opportunity must meet the following criteria:

- The learning opportunity must either be sponsored by UWW, an authorized and chartered United Way organization (local, state or regional), or an approved partner of UWW (list of approved partners is available from UWW's Learning and Conferencing team.)
- It must provide a learning and/or development opportunity which builds skills, knowledge and capability directly related to one or both of the following:
  - System transformation and development of people with the goal of system building (i.e., how to follow Standards of Excellence; develop a community agenda; evaluation measurement; civic engagement; investing resources for impact; and professional leadership profiles to support the United Way of the future).

- Improving the operational efficiency and effectiveness of the United Way system (i.e., the integration of back office operations to focus on results; commitment to transparency and accountability; and operating for impact/cost efficiency).
- The program and materials must be accessible system-wide, open to all and marketed on United Way Online.

## Allocation and Application of Flex Credits

UWC Size	Flex Credits	Total (USD)
<b>Metro 1</b>	<b>55% of total</b>	<b>\$24,100</b>
	United Way Toronto & York Region	\$8,700
	United Way Calgary & Area	\$3,400
	United Way Lower Mainland	\$2,000
	United Way Centraide Ottawa	\$2,000
	United Way Winnipeg	\$2,000
	United Way Alberta Capital Region	\$2,000
	United Way Peel Region	\$2,000
	Centraide Québec et Chaudière-Appalaches	\$2,000
<b>Metro 2</b> (9 UWCS)	<b>16% of total</b>	<b>\$7,155</b>
	UWCs will each have funds reserved for their use.	\$795
<b>Metro 3-4</b> (34 UWCS)	<b>14% of total</b>	<b>\$6,000</b>
	UWCs will complete an application process.	Up to \$995
<b>Metro 5-9</b> (42 UWCS)	<b>5% of total</b>	<b>\$2,000</b>
	UWCs will complete an application process.	Up to \$995
<b>UWCC</b>	<b>10% of total</b>	<b>\$4,350</b>

### Notes:

- Centraides not currently participating in the French Language Pilot have been excluded from the numbers above.
- US Dollar amounts calculated using the exchange rate used to calculate United Way Worldwide 2016 membership dues (0.756).

### Reserved Resources:

For those UWCs who have a set amount of reserved credits available to them, UWCC will request UWW deposit the set amount in the UWC's Flex Credit account on United Way Online in January of each year. Utilization of these credits will be monitored on an ongoing basis by UWCC, with support from UWW, to ensure utilization.

### Pooled Resources:

For those UWCs part of a pooled credit group (Metros 3-9), UWCC will issue an application for credits in December of each year. Successful applicants will be notified by email and UWCC will have UWW deposit the approved amount in the Flex Credit account of the UWC.

As Flex Credits expire December 31<sup>st</sup> each year, UWCC will actively monitor the use of credits to ensure UWCs utilize the full amount.

### **Application Process for Pooled Resources**

For those UWCs part of a pooled group (Metros 3-9), UWCs can apply for flex credits using the UWCC Flex Credit Application Form available on United Way Online. UWCC will accept applications for flex credits on a rolling basis throughout the year, awarded on a first-come, first-served basis.

### **Organizational Transformation**

In the event of a merger, which may result in the changing size category of UWC(s), flex credit amounts will remain unchanged for the current fiscal year. At the end of that year, the proposed allocation for the following year will be reviewed to ensure the distribution of flex credits remain appropriate with such organizational changes in mind.

### **Cancellations & Failure to Attend**

Flex credits are a pooled resource available to the UWC Movement in Canada. As a result, we ask that UWCs recognize and respect that for each UWC receiving flex credits, another UWC is not.

UWCs who receive flex credits are required to attend the training or event for which it was applied or are to cancel and obtain a full-refund. Should this UWC not be able to reuse the flex credits for another training or event, UWCC will reallocate the flex credits to another UWC as per the guidelines below.

Cancellations often result in cancellation charges or have an established deadline by which a registered attendee is eligible to receive a full refund. Any and all fees charged for a cancellation will be paid for by the UWC. Should a UWC register for an event with flex credits and fail to attend or cancel without obtaining a refund, the UWC will reimburse UWCC for the full value of the registration. These funds will be reallocated to other UWCs in the form of flex credits for UWC training or events.

### **Unused Flex Credits**

UWCC will actively monitor flex credit usage to ensure the awarded UWC utilizes the full value of the credit. Should a UWC not utilize the funding within a reasonable timeframe, UWCC will reallocate the credits to another UWC.

A “reasonable timeframe” will be evaluated on a case by case basis. As a guiding principle, those UWCs receiving flex credits in Q1 should have demonstrated an active use of their flex credits by the beginning of Q3. A UWC may retain their flex credits provided they inform UWCC of the intention to register for an upcoming learning event using the allocated flex credits.

UWCC will not re-allocate flex credits without informing the original recipient UWC.

All allocated flex credits must be used by December 31 of the same year.

### **Exceptional Circumstances**

Should a UWC who has been awarded flex credits not be able to use them due to exceptional circumstances, that UWC may have their credits reallocated to another UWC and be placed in priority for credits the following year. Such requests will be considered on a case-by-case basis.

As guidance, UWCC views the following exceptional circumstances as grounds for consideration:

- Natural disaster and critical incidence - a recent natural disaster or critical incidence that has affected the UWC.
- Recent change in chief executive officer at the UWC.
- Significant economic downturn affecting the ability of a UWC to undertake travel expenses.