A study of the special projects of United Way Windsor-Essex County.

June. Cheeseman

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LA THÈSE A ÉTÉ MICROFILMÉE TELLE QUE NOUS L'AVONS RÉCEVE
A STUDY OF THE SPECIAL PROJECTS OF
UNITED WAY WINDSOR-ESSEX COUNTY

by

© June Cheeseman

A Thesis submitted to the Faculty of Graduate Studies through the School of Social Work in Partial Fulfillment of the requirements for the Degree of Master of Social Work at The University of Windsor

Windsor, Ontario, Canada

1979
RESEARCH COMMITTEE

Dr. John Barnes  
Professor Val Cruz  
Dr. Helen Milton  
Mr. Gary McCarthy

Chairman  
Member  
Member  
Member
DEDICATION

The researcher would like to dedicate her thesis in memory of David Hemming who always encouraged her to continue her education and to attempt all things.
ABSTRACT

A STUDY OF THE SPECIAL PROJECTS OF
UNITED WAY WINDSOR-ESSEX COUNTY

by

June Cheeseman

The purpose of this research project was to gain familiarity with the nature of decision-making processes as they related to voluntary funding organizations and in particular to test out the effectiveness of the response to community requests for Special Projects as seen in the operation of the Special Projects Committee of United Way of Windsor-Essex County. Specifically, the purpose of the research project was to study the procedures used by the Special Projects Committee in determining the allocation of funds to new and innovative projects in order to meet emerging and existing needs.

"It was hoped that the resulting information would assist United Way in improving the process of Special Projects. In addition, the research assessed the attitudes on the part of Special Project applicants toward the development of a standardized model for evaluating program effectiveness."
A review of the literature was undertaken to gain an understanding of decision-making processes and those issues which affect it. The entire Special Projects population (Applications from 1972 to and including 1979) was studied at the time of the research project. A research methodology was designed and a questionnaire was developed to collect the data on the various aspects of the Special Projects Committee process. Data was obtained from thirty-eight agencies.

Among the general findings were: that Special Project recipients have a desire for a standardized model of evaluation and that they wish to be a part of the process that develops such a model. They also feel that United Way should supervise the individual projects and as a result would like to have consultation more readily available. The researcher speculated that one reason for this might be that with new and innovative projects there is a need to become more sophisticated and to examine the program results against stated objectives.

The implications of the findings were discussed and subsequent recommendations were made: a) for further research, and b) to United Way.
ACKNOWLEDGEMENTS

The researcher wishes to express her appreciation and thanks to her thesis committee members for their support, advice and co-operation throughout the duration of this research project. She is particularly indebted to her chairman, Dr. John Barnes, without whose continuous encouragement this thesis would not have been completed.

Her gratitude also goes to her family and friends who encouraged the researcher to return to University and complete her Masters Degree.

Windsor, Ontario
August 31st, 1979

June Cheeseman
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CHAPTER I

INTRODUCTION

Public accountability for services rendered and funds expended is a responsibility of both public and voluntary agencies in the field of social welfare. In times of economic uncertainty and increasingly scarce resources for social services, contributors expect voluntary funds to be distributed in a manner which promotes the general welfare of the community. In addition, they want assurance that funds are distributed and utilized in an effective and efficient manner.

Public and voluntary agencies have a responsibility to provide information regarding how well agencies succeed in achieving the goals for which they were established. They also have a responsibility in assessing if there are more efficient and effective means of providing services to meet emerging and existing needs.

A prime responsibility of United Ways is to ensure the community that the funds have been utilized in an efficient and effective manner. In setting aside a certain percentage of funds raised from the community for Special Projects, United Way of Windsor and Essex County must be confident that the groups obtaining these funds are meeting existing and emerging needs. United Way must also be confident that these
groups are operating in an efficient and effective manner. In an effort to ensure that Special Project agencies are permitted to operate autonomously and yet be accountable to both United Way and the community, United Way must examine its process of allocating funds to new and innovative projects.

Purpose

This research project is concerned with the very contemporary topic of accountability in relation to program effectiveness. The purpose of this research project is to gain familiarity with the outcome of decision-making processes as they relate to voluntary funding organizations in general and in particular to test out the effectiveness of the response to community requests for special projects as seen in the operation of the Special Projects Committee of United Way of Windsor-Essex County. Specifically, the purpose of this research project is to study the procedures used by the Special Projects Committee in determining the allocation of funds to new and innovative projects in order to meet emerging and existing needs.

It is hoped that the resulting information will assist United Way in improving the process of Special Projects. In addition, the research assesses the attitudes on the part of Special Project applicants toward the development of a standardized model for evaluating program effectiveness.

The stimulus to explore this particular area came
directly from the researcher's Masters in Social Work (M.S.W.) administrative placement at United Way. In her initial contact with the Special Projects Committee, emphasis seemed to be placed on the innovative aspects of the groups requesting funding and not as much concentration upon the evaluation of program effectiveness. This may be partly planned as United Way does not expect new projects to be overly sophisticated.

In exploring the Special Projects Committee process, it was discovered that although the committee is given general criteria for allocating funds, no specific guidelines or criteria were established. This fact, along with the small amount of funds set aside for new and innovative projects, motivated the researcher to investigate this area in greater detail.

The literature was explored to gain an understanding of decision-making processes and those issues which affect it. It was noted in these readings that accountability to the community and general public were becoming of great concern.

The combination of these observations and the fact that no previous research had been conducted into the Special Projects Committee process led the researcher to formulate this particular research project.

An overview of United Way and the historical development and process of the Special Projects Committee was done. The literature was reviewed with particular emphasis placed upon the areas of decision-making and those issues affecting it.
A research methodology was designed and a questionnaire was developed to collect data on the various aspects of the Special Projects Committee process. This questionnaire was administered to applicants of Special Projects from the years 1972 to and including 1979. The findings and subsequent recommendations are presented in the final chapter of this report.
CHAPTER II

UNITED WAY

An Overview

In Canada the United Way Movement began with the formation of Jewish Philanthropists in both Toronto and Montreal in 1917 and the Toronto Federation for Community Service in 1918. Social agencies had conducted their own private appeals prior to the formation of the Federations. Due to the ever-increasing multiplicity of appeals, returns began to diminish. The Federations were established to integrate these fund raising activities into one federated campaign (United Way of Windsor-Essex County Five Year Planning Committee Report, 1979, p. 4).

By 1922 organizations based on similar federating principles were created in Montreal and Winnipeg. There were 36 Federations operating in Canada by 1945, 65 were operating by 1950 and 76 in 1955. Presently, there are over 600,000 volunteers involved in over 90 United Ways raising in excess of 70 million dollars and allocating it to over 2,400 agencies serving a population of over 15 million (United Way of Windsor-Essex County Five Year Planning Committee Report, 1979, p. 5).

Social Planning Councils were first organized in Canada in the late 1920's and early 1930's. These Councils were formed as Federations attempted to co-ordinate and
develop better community services. Originally, they consisted of agency representatives only and were called Councils of Social Agencies. With the expansion of activities beyond social service delivery into areas such as research, social planning development and advocacy, the Councils became known as Social Planning Councils with a broad range of community representative membership. Today there are over 50 Social Planning Councils in Canada (United Way of Windsor-Essex County Five Year Planning Committee Report, 1979, p. 5).

United Way of Windsor-Essex County

In Windsor the first public fund raising campaign was held by the Y.M.-Y.W.C.A. in 1924. The Border Cities Citizens' Services Committee, which later became known as the Windsor Community Services Incorporated, was formed in the 1930's to conduct an annual fund drive among certain industries in Windsor. The Community Fund of Windsor was incorporated in 1947. Its purpose was to eliminate multiple appeals through the raising of funds. The allocation of funds was, of course, part of its role, but much more emphasis was placed on the single fund raising drive (United Way of Windsor-Essex County Five Year Planning Committee Report, 1979, p. 5).

The Windsor Health and Welfare Council was created in 1948 to conduct year round planning and co-ordination among health and welfare services in the City. The Fund and the Health and Welfare Council merged under a common administration
in 1962 and it became known as United Community Services. This merger enabled the Fund to increase its capacity in allocating voluntary funds according to existing and emerging community needs. This co-operative effort also assisted in minimizing competition over volunteer time. As a result, the pooling of expertise and resources was able to bring Social Planning in closer touch with the requirements of agencies delivering local services. The only other major cities in Canada which have merged Campaign and Social Planning are the London and Vancouver United Ways (United Way of Windsor-Essex County Five Year Planning Committee Report, 1979, p. 5). In 1975 the organizational name was changed to United Way of Windsor-Essex County. This final name change allowed the Windsor organization to identify more closely with the national affiliation.

Goal and Objectives of United Way

United Way of Windsor and Essex County has as its primary objective "To provide voluntary community services to meet existing and emerging needs in the geographic community it serves" (United Community Services of Greater Windsor, 1972, p. 7). This is accomplished through:

1) an annual public appeal for funds through the campaign committee
2) year round Social Planning
3) allocations to a) member agencies, b) new and
innovative projects, c) County based agencies and d) National and Provincial based agencies (United Community Services of Greater Windsor, 1972, p. 7).

This primary objective of United Way of Windsor-Essex County coincides with the basic goal of the United Way movement, that being to provide a means by which a cross-section of citizens and agencies, both government and voluntary, may engage in a community-wide effort to deliver efficient human service programs effectively related to its current needs (United Way of America, 1976, p. 7).

Organization

In that United Way is a voluntary agency, decision-making regarding policy takes place at the level of the Board of Directors. The role of administration and staff is to research and implement approved policy (UCS of Windsor and Essex County Personnel Policies, 1975, p. 1).

In order to depict the organizational structure of United Way of Windsor-Essex County, the researcher has included the organizational charts for both the Board of Directors and the Staff of United Way (see Charts 1 and 2).

For more detailed information, Kathryn Louise Oper in her thesis, A Study of the Program and Budget Review Committee Process of the United Way of Windsor-Essex County (1978), provides a detailed account on the development of United Way.
BOARD OF DIRECTORS
UNITED WAY OF WINDSOR-ESSEX COUNTY

PAST PRESIDENT

PRESIDENT

SENIOR VICE-PRESIDENT

SECOND VICE-PRESIDENT

THIRD VICE-PRESIDENT

TREASURER

SERVICE GROUP 1
SOCIAL PLANNING COMMITTEE
- Chairman
- Director Liaison

SPECIAL PROJECTS COMMITTEE
- Chairman
- Director Liaison

ADMISSIONS COMMITTEE
- Chairman
- Director

SERVICE GROUP 2
CAMPAIGN COMMITTEE
- Chairman
- Director Liaison

PROGRAM & BUDGET REVIEW COMMITTEE
- Chairman
- Director Liaison

SERVICE GROUP 3
AGENCY RELATIONS COMMITTEE
- Chairman
- Director Liaison

LABOUR COMMITTEE
- Chairman
- Director Liaison

SERVICE GROUP 4
FINANCE & ADMINISTRATION COMMITTEE
- Chairman
- Director Liaison

LINE OF SUCCESSION (LOCKED-IN)

ROTATION OF SERVICE GROUPS HEADED BY SUCCESSIVE VICE-PRESIDENTS

LINE OF AUTHORITY
Allocations and Agency Relations

As an integral part of operationalizing United Ways' objective of providing voluntary community services to meet existing and emerging needs, the function of Allocations is to disburse funds voluntarily contributed by the public in order to bring about effective delivery of services in the community (Allocations and Agency Relations Review, A Report to the Five Year Planning Committee of United Way of Windsor-Essex County, 1979, p. 3).

There are four United Way funding mechanisms that voluntary agencies meeting needs in Windsor and Essex County can make use of. They are:

1. **ADMISSIONS** - an agency providing programs to meet on-going needs can apply for member agency status. Approximately 85 per cent of United Way revenues are allocated to member agencies each year by the PROGRAM AND BUDGET REVIEW COMMITTEE.

2. **SPECIAL PROJECTS** - provides a maximum of two years of funding for innovative programs and projects. Its purpose is to encourage new and creative approaches to solving social problems and delivering social programs. Presently $75,000.00 is spent on Special Projects.

3. **COUNTY GRANTS** - in 1972, as United Way expanded its geographic jurisdiction to include Essex County, County Grants were established to encourage the development of County based services.

4. **NATIONAL AND PROVINCIAL AGENCY GRANTS** - are provided to National and Provincial agencies (The Arthritis Society, Canadian Council on Social Development and Ontario Welfare Council) which, although they are not located in Windsor and Essex County, provide services which are of direct benefit to people living in Windsor and Essex County (United Way Five Year Planning Committee Report, 1979, p. 15).
The allocation of funds through these four funding mechanisms takes place annually.

Also available through United Way are resources other than financial. Professional staff is available to assist member agencies and non-member agencies in such areas as identifying needs, developing programs, strengthening finances, planning and management capability, public relations, program evaluations, etc. (United Way Five Year Planning Committee Report, 1979, p. 15).

History Leading to the Development of the Special Projects Committee

United Funds and Social Planning Councils in North America were coming under close scrutiny by the community at large as well as suffering from internal criticism in the 1960's and early 1970's. A general criticism leveled at United Funds was that they allocated monies only to traditional agencies, as opposed to new groups who were trying to meet emerging needs. This criticism was particularly leveled at the Toronto United Fund.

In Windsor, United Community Services, like its counterparts, came under similar scrutiny and questioning. Its credibility, its role and its importance in the Windsor community were being tested (Special Review Study, Report of United Community Services Review Committee, 1972, p. 3).

Partly as a result of the questioning that was taking place, United Community Services in Windsor established a
Review Committee. This Review Committee decided that the review of United Community Services should consist of three phases; phase one was information gathering from the community and member agencies; phase two was a detailed review of the major components of United Community Services; and phase three was a self evaluation of United Community Services (Report of United Community Services Review Committee, 1972, pp. 5-6).

The concept of Special Projects evolved from the 1971 Review. The intent of Special Projects was and is to provide short term grants to encourage the development of new and innovative responses to meet existing and emerging social problems. Special Projects allowed the voluntary sector to respond quickly in a creative manner to meet needs on an experimental basis. This process has allowed United Way to demonstrate its flexibility to shift funding more readily from areas where it previously had traditional, extensive funding commitments. Since its inception in 1971, Special Projects has allocated $421,623 for 72 projects (United Way of Windsor-Essex County Five Year Planning Committee Report, 1979, p. 16).

Responsibility of Special Projects Committee

The Special Projects Committee, made up of 21 people from the community, is responsible for making recommendations to the United Way Board of Directors for the funding of
innovative or special projects involving new areas of service to the community (Special Projects Manual for Committee Members, 1978, p. 18).

Special Project grants are available for a specified time period to United Way member agencies and non-member agencies or groups in Windsor and Essex County (Special Projects Manual for Committee Members, 1978, p. 18).

The Special Projects Committee adheres to an established process. This process is described as follows:

1. The agency, organization or group requesting a grant from United Way must complete the application form and return it to the Special Projects Committee by the deadline date.

2. The application will then be reviewed by the Special Projects Committee and the agency, organization or group may be invited to meet with the Special Projects Committee during October to discuss the application. The Special Projects Committee will then make a recommendation to the United Way Board of Directors on the support level of the projects.

3. The agency, organization or group requesting a grant will be notified of the decision made by the United Way Board of Directors on their request. (Special Projects Manual for Committee Members, 1978, p. 20)

Committee Members' Roles and Responsibilities

The committee members' roles and responsibilities are outlined in the "Manual for Committee Members" (1978, p. 22). They are as follows: committee members are responsible for reviewing the information presented to them by agencies and based on the discussions that take place at the meeting, through
the chairman, make recommendations to the United Way Board. The support level and program recommendations are to be as objective as possible based on the information available. These recommendations are not to be based on the personalities of the agency personnel involved (Special Projects Manual for Committee Members, 1978, p. 22).

**United Way Staff Role to Special Projects Committee**

The staff person is foremost a resource to the Committee. The task of the staff person is to help the Committee and individual panels operate smoothly in order to efficiently meet their objectives. The staff person is not a voting member of the Committee and is responsible for ensuring that the necessary materials and information are available, as well as taking minutes of decisions and completing a draft copy of the summary sheets for the panel chairman. The staff person is responsible for providing any additional information for the review of an agency during the pre-meeting. During the meeting with agencies the United Way volunteers carry the responsibility for listening to the volunteers from the applicant organization, clarifying any matters that appear to be obscure, and raising questions to uncover other aspects of the request that have not been touched upon. The role of the United Way professional is to observe and render assistance to the volunteers only when called upon to do so, or when they are in obvious difficulties. At the post meeting, the United
Way professional helps the panel to arrive at a decision on the support level and recommendations and rationale for the decisions (Special Projects Manual for Committee Members, 1978, p. 25).

Agreement Between United Way and Special Project Recipients

In formalizing an agreement with Special Project recipients, United Way points out that they have a responsibility to the Windsor and Essex community. They note that United Way is responsible for distributing voluntary dollars and it is crucial as funds available do not equal the requests.

Some specific guidelines are suggested in the Special Projects Manual for Committee Members and they are listed as follows:

1. In most cases a grant made by United Way may be used for operating purposes only and not for capital expenditures.

2. Any agency, organization or group receiving a grant from United Way should be encouraged to establish realistic dues and fees policies. Full realization of potential income from those who can afford to pay for service permits the use of United Way funds for the provision of maximum service to those who are unable to pay.

3. If through staff vacancies, discontinuance of programs, faulty estimate of income and expenses, or good fortune, an organization completes its year's program without spending its full allocation, the money remaining from the grant should be returned to United Way.

4. The funding of all innovative and special projects is contingent on a successful United Way campaign.
5. Ordinarily, a grant will not extend beyond a two-year period.

6. Ordinarily, programs, projects or services now operating in the community will not be given high priority in funding through the grants structure. (Special Projects Manual for Committee Members, 1978, p. 21)

**Timing for Applications**

The Special Projects Committee reviews applications in October of each year. Applications are due on or before September 28. Agencies or groups are informed of the United Way decision on their requests by early December and funding normally begins January 1 (Special Projects Manual for Committee Members, 1978, p. 19).
CHAPTER III

REVIEW OF LITERATURE

Introduction

In view of the purpose of this research project as stated by the researcher in Chapter I, it is relevant for the reader to become familiar with and understand the outcomes of decision-making procedures as they relate to voluntary funding organizations. This particular subject area was chosen by the researcher since United Way of Windsor-Essex County primarily uses volunteers in the decision-making process for the purpose of allocating funds for new and innovative projects.

The researcher will also consider in reviewing the literature issues that have an effect on the decision-making process.

BACKGROUND OF THE PROBLEM

The Question of Accountability

As society enters into a period of economic uncertainty, expenditures on all levels have become astronomical. Both public and voluntary agencies in the field of social welfare have been affected by the economic climate.

It should come as no surprise that social services have come under closer scrutiny and criticism during the last
few years. Due to the high cost of projects and programs, credibility and accountability have become the words of the day. A demand for evaluation and accountability has been made by funding sources and the general public. One explanation for this demand states:

As the search for innovation and relevance in program planning and development has increased, demands for evaluation have also increased. Program directors are being asked by funding sources, professional groups, clientele and a more sophisticated general public to demonstrate not only the needs to which their programs are addressed, but also the contributions that they make in solving or alleviating social problems. (Tripodi, Fellin and Meyer, 1971, p. 4)

In other words, professionals in a field of human services must become accountable and the services that are provided should be accountable.

Scott Briar (1973), in discussing accountability, clearly identifies how professionals must deal with this problem. He states:

First we need to acquire the skill to describe what we are trying to accomplish and how we hope to accomplish it in a language that is specific and clear enough for consumers and the public to understand and for evaluators to appraise. Second, we need to incorporate into agency operations and the daily routine of practice the developing means for continuously monitoring and assessing the results of our efforts. And third, we need to explain to others what we are doing with what success and the importance of what we do. (p. 2)

It would seem then that accountability and program evaluation are closely linked. There appears to be a three-fold purpose to program evaluation; one being concerned with justifying the program, the second to ensure the service as stated is
being provided, and thirdly to improve on the existing service or program. One can note then that accountability and program evaluation can be closely linked and that program evaluation can serve as a useful tool in assisting the human services to become more accountable.

Kadushin (1973) states that "The concept that social service agencies are responsible to the community they serve is the hallmark of accountability" (p. 63). It would seem then that not only are social service agencies responsible to the community they serve, but that funding agencies are also responsible to their community. Thus, United Way of Windsor-Essex County, in allocating funds for new and innovative projects, must be accountable to the Windsor-Essex community. Those that receive funding from United Way must, in turn, be accountable to both the community they serve and the United Way.

Program Evaluation: A Tool Toward Accountability

Program evaluation is a term that is widely used and, as a result, has many definitions. The definitions range on a continuum from narrow to broad. Franklin and Thrasher, in An Introduction to Program Evaluation, share with the reader the broad range of definitions. They note that James Ciarlo uses a narrow definition which limits program evaluation to outputs which are related to the achievement of program ob-
jectives. At the other end of the continuum they note that Paul Binner concludes that program evaluation should be used in referring to a comprehensive evaluation of the entire system under consideration. Franklin and Thrasher (1976) have chosen a reasonably broad definition which includes the determination and assessment of the results of program activities (pp. 21-23).

Programs are usually measured against objectives. In other words, "Does the program in fact do what it states that it does?". Len Rutman (1977) appears to use the terms 'program evaluation' and 'evaluation research' synonymously. He offers a succinct definition which the researcher feels is appropriate for this study. Rutman states:

Evaluation research is, first and foremost, a process of applying scientific procedures to accumulate reliable and valid evidence on the manner and extent to which specified activities produce particular effects or outcomes. (p. 10)

It would seem that, inherent in this definition is the idea that specified goals are tested out against the program. However, Rutman (1977) cautions against restricting outcomes to goals. He states:

Evaluation researchers often limit their attention to only those outcomes which fall under stated goals. This places restrictions on the scope of the research because such an approach can miss latent goals (i.e., those which are not formally stated), unintended consequences, as well as other anticipated effects. (p. 17)

All the variations in the definitions reveal that there is not a simple unitary concept, however, in all the
definitions there are some similar components.

Evaluation research is essential in a day where there are continuous advances in human knowledge and technology. Evaluation research provides necessary feedback and proof of success or non-success. Suchman (1967) points out, a better educated and more sophisticated public is less willing to accept programs on faith alone (p. 4).


**Decision-Making Processes**

Decision-making and participation are both extremely important in community service organizations. The work of such organizations must be effective and so decisions must usually be made promptly. Yet their very purposes - to assist people with their problems, to help them to develop and grow - make participation necessary. (Johns, 1966, p. 172)

Voluntary organizations such as United Way are involving volunteers more and more in the decision-making processes of their organizations. The Special Projects Committee utilizes volunteers from all segments of the community. As stated in Chapter II, this Committee is responsible for recommending the allocation of funds to new and innovative projects.

Ray Johns (1966) states that:

Wide participation in decision making is being more and more accepted as valid in all types of organiza-
Johns further elaborates that two reasons underlie this belief. They are 1) to more fully utilize the abilities of different people, and 2) the growth and morale of the people involved are stimulated (p. 172).

Kepner and Tregoe (1965), in their book *The Rational Manager*, define decision as "a choice between various ways of getting a particular thing done or ends accomplished" (p. 50). This choice is not always simple. Tead (1951) notes that the decision-making process is far more collaborative than is generally realized (p. 126). Johns (1966) states that:

> Wise decisions are usually joint decisions. Such decisions, based on the knowledge and feelings of everyone involved, are more likely to be the correct decisions. They are more likely to be acceptable to everyone concerned and thus more likely to be effective. (p. 174)

The nature of decision-making, because it involves human beings, must account for the feelings and behaviour of individuals. Alexis and Wilson (1967), in discussing the decision-making process, state that:

Decision theory inevitably falls short of the "complete" decision model. For a decision model to be complete, that is universally applicable, it must be able to prescribe behavior in the most complex, as well as the simplest, cases. It must be capable of reflecting all dimensions of choice situations. . . . As a by-product of attempts to define and outline a "complete" model, we have come to recognize six elements common to all decisions: (1) the state of nature; (2) the decision maker; (3) the goals or ends to be served; (4) the relevant alternatives and the set of actions from which a choice will be made; (5) a relation that produces a preference ordering of alternatives; and (6) the choice itself, the selection of one or some
combination of alternatives. (p. 149)

Alexis and Wilson (1967) further elaborate on this discussion of decision theory by defining their six elements. The state of nature, they define as, including those aspects of the decision makers' environment that affect the choice. The term 'decision maker' as utilized by Alexis and Wilson can refer to either an individual or group. Goals and ends refer to the objectives that the decision maker is trying to achieve. The remaining three elements are self explanatory (p. 149).

Alexis and Wilson (1967) offer two models for decision making - a closed model and an open model. The model most commonly used in organizations is the closed model. This is an analytical framework and at the centre of the framework is a concept of rationality.

An individual is faced in a given situation with a number of choices, or several possible courses of action. . . . We call an individual rational if he takes into account the possible consequences open to him; if he can arrange or order consequences by his preference for them, and if he considers this ordering; and if in the light of this knowledge, he chooses the course of action which, in his estimation, leads to the best or most preferred consequences. (p. 150)

Alexis and Wilson (1967) further clarify what they mean by the ideal rational man. The rational man makes a choice on the basis of the following three elements:

A known set of relevant alternatives with corresponding outcomes; an established set of relations that produce a preference ordering of alternatives and the maximization of something, such as money, income, physical goods or some form of utility. (p. 150)
The open model offered by Alexis and Wilson parallels an open system and is influenced by the total environment. The decision maker does not always recognize all the goals and alternatives. In the open model the individual attempts to control his behaviour. "The decision maker's behavior reflects his perception of people, roles and organizations, in addition to his own values and emotions" (Alexis and Wilson, 1967, p. 150). In an effort to act rationally, the individual attempts to make the best use of the information available to him. Often, however, the individual does not recognize or weigh all the alternatives (Alexis and Wilson, 1967, p. 151).

In the open decision model the individual passes through three time periods (see Chart 3). In the first time period, the individual starts out by identifying and defining action goals. These goals may be considered as representative of the aspiration level of the decision maker. The second time period involves the defining of a limited number of outcomes and alternatives. The third time period deals with searching for a satisfactory solution to the problem. Satisfactory in this situation refers to the aspiration level or action goals as stated in time period one (Alexis and Wilson, 1967, p. 160).

The differences between open and closed models are not always apparent. Alexis and Wilson clarify these differences as follows:

1. Predetermined goals are replaced by some unidentified structure that is approximated by an aspiration level.
The Open Decision Model

Problematic stimulus.  
START

Approximate aspiration level (L) → Take initial action

Derive subjective value of outcome U(0) → Invite alternative and obtain outcome

Select limited number of alternatives

Period 1

Period 2

Repeat!

Compare value OK of outcome U(0) with aspiration level (L)

Decrease level of aspiration

Increase range of alternatives

+ If outcome less than aspiration

− If outcome more than aspiration

Increase level of aspiration

Decrease range of alternatives

Wait for further stimulus

Source: Alexis and Wilson, *Organizational decision making.*
2. All alternatives and outcomes are not pre-determined, nor are the relations between specific alternatives and outcomes always defined.

3. The ordering of alternatives is replaced by a search routine that considers a relatively small number of alternatives.

4. The individual does not maximize but seeks to find a solution to satisfy an aspiration level. (Alexis and Wilson, 1967, p. 161)

The open decision model adds a realism to the decision-making framework. The capacities of the individual are taken into account and the dynamics of choice are introduced. This model allows for the consideration of the totality of external and internal forces affecting the decision of the individual (Alexis and Wilson, 1967, p. 162).

Although the closed decision model is most widely used in organizations, there has been a growing disenchantment with the closed model. The authors feel that the open decision model will gain support and be utilized in solving social problems (Alexis and Wilson, 1967, p. 162).

It is evident to the researcher that professionals and volunteers involved in the allocation of funds, in order to logically justify to the public their decisions regarding specific allocations, are continuously looking for more sophisticated models to determine the allocation of funds.

United Way organizations are faced with the challenge of trying to "develop a model for reviewing programs that can accommodate the concerns about political, organizational, and
technical feasibility inherent in the delivery of social services, yet provide a sound knowledge for decision-making" (Brody and Krailo, 1978, p. 226).

United Way organizations must not only develop models of decision-making for committees but also for the board of directors. Roland Warren (1973) states that "In the voluntary association, formal decision-making authority lies in a board of trustees" (p. 215). As stated in Chapter II, the Special Projects Committee of United Way is only responsible for making recommendations regarding the allocation of funds. The Board of Directors is responsible, in the final analysis, for determining the allocation of funds to new and innovative projects.

Peter Drucker, in his book *The Effective Executive*, states that the effective decision does not flow from a consensus on the facts. The right decision usually grows out of the clash and conflict of divergent opinions and out of the consideration of alternatives (1966, p. 143). As Alexis and Wilson stated earlier, there is no one decision-making model that is universally acceptable when human behaviour is involved. It is evident to the researcher that organizations must be aware of the factors involved in the decision-making process, and in training committees or board members make them aware of these factors. The goals and objectives of the organization must be clearly outlined to the volunteers.

Ray Johns (1966), outlines succinctly eight factors
which affect the decision-making process. These factors are paraphrased as follows: 1) the values, goals or objectives which affect the decision; 2) the facts of the situation; 3) organization loyalties which develop as workers accept the purposes of the organization; 4) authority; 5) advice and information flow; 6) efficiency in attaining desired goals; 7) informal and formal training; and 8) willingness of persons involved to make decisions (pp. 175-176).

The eight factors outlined above, along with the two models offered by Alexis and Wilson serve to point out that individuals involved in decision-making processes must constantly be aware of the forces which can influence decision-making. Decision-making is one of the most influential factors in determining and assessing the effectiveness of work done (Johns, 1966, p. 181).

Decision-Making and Accountability as It Relates to Voluntary Funding Organizations

Decisions are made in different areas of organizations. Board of Directors make decisions, committees make decisions, individuals, executives and staff make decisions. Johns (1966) points out that the Board of Directors are responsible for adopting general policies and approving major procedures. The final responsibility in an organization lies with the Board of Directors. Committees, according to Johns (1966), are primarily planning and recommending bodies. They decide
what to recommend (p. 179).

United Way, as a voluntary funding organization, is constantly involved in decision-making processes.

Volunteer leaders in United Way organizations face increasingly difficult decisions about funding each year. With the advent of the 'Age of Accountability', a more sophisticated citizenry is beginning to demand documentation and the effective use of public and private funds. (Brody and Krailo, 1978, p. 226)

United Way organizations are faced with the challenge of defending their decisions to the general public and the community at large. In other words, United Way organizations must be accountable for the manner in which they disburse their funds. The researcher contends that voluntary organizations, such as United Way, must strive to achieve a level of accountability that addresses the results and effectiveness of their distribution of funds.

It is evident to the researcher that decision-making must play a primary role in the allocation of funds, however, it should not become the sole factor. United Ways are accountable to the community they serve and social agencies are accountable to both the community they serve and funding organizations. The process of reviewing an agency for the purpose of allocating funds must include assessing the effectiveness and efficiency of the agency. As stated earlier, program evaluation is one tool for accountability. The chart on the following page depicts the process that is involved in the review and decision-making process utilized by United Way. The implementation of a decision-making model together
Review and Decision-Making Process

- agency identifies problem
- develops variable objectives
- plans & implements activities/programs
- gathers & analyzes information
- provides feedback

To agency board

to allocating body

- post questions
- agency responds
- allocation recommendations

- No corrective action taken
- Corrective action required

allocations decision

other factors considered

Source: United Way of Windsor-Essex County, 1979
with a program evaluation procedure would serve to assist United Way in becoming more accountable to the community.

Conclusion

In surveying the literature, the researcher concentrated on two models for decision-making processes which were applicable to the research topic. Other literature dealt mainly with business organizations and were therefore irrelevant to this particular study. Theories of decision-making have their origin in economic theories (Edwards, 1954) and, as a result, most of the studies are geared toward business organizations.

In the researcher's opinion, large contributors such as corporations are becoming increasingly sensitive to and demanding of indications of effectiveness and benefits of social service agencies. Professionals are also becoming more and more sensitive to the demand of accountability.

The two models described in the context of this chapter had limitations and it became apparent that when human behaviour is involved, the decision-making process cannot be totally objective in nature. "The importance of viewing decision making in terms of organization processes cannot be overemphasized" (Olmstead, 1978, p. 100).

In an age of accountability and economic uncertainty, the pressure on social service agencies to become accountable is increasing. Thus, accountability and decision-making are two important factors for voluntary funding agencies.
It is apparent that there is no easy answer to providing a model for decision-making and that voluntary organizations such as United Way must currently provide ongoing training sessions for their volunteers in assessing agencies in as objective a manner as possible. These organizations have the responsibility of making their volunteers aware of the factors influencing decision-making. This, together with a standardized form of evaluation, would assist the volunteers in determining the allocation of funds in a more objective manner.
CHAPTER IV

RESEARCH DESIGN

Research in the social sciences and related disciplines involves the use of a variety of available methods to obtain relatively unbiased observations of human behavior and such research is concerned with logical alternatives for approximating degree of relative certainty in the attainment of knowledge. (Tripodi et al., 1970, p. 3)

This use of available methods and strategies based on the objectives of research investigations allows research to be classified into three broad categories of experimental, quantitative-descriptive and exploratory studies.

In this particular research project, no previous research has been conducted on the process of the Special Projects Committee of United Way of Windsor-Essex County. Thus, the amount of available knowledge does not allow for a more refined type of research design such as the experimental design.

Experimental studies are empirical research investigations which have as their primary purpose the testing of hypotheses concerned with cause-effect relationships. These studies use experimental designs which include the manipulation of independent variables in order to control pertinent factors to as great a degree as possible. These studies also include control groups and randomization procedures. They may employ
rigorous sampling techniques to increase the generalizability of the experimental findings (Tripodi et al., 1970, p. 13).

Quantitative-descriptive studies are defined as empirical research investigations whose major purpose is the delineation or assessment of characteristics of phenomena, evaluation of programs, or the isolation of key variables. These studies use formal methods as approximations to experimental design with features of statistical reliability and control to provide evidence for testing hypotheses. They use quantitative devices for systematically collecting data (Tripodi et al., 1970, p. 139). But, they are not predictable in nature and no generalizations are possible.

Quantitative-descriptive studies are further sub-typed into hypotheses testing, population description, evaluation and variable relationship studies. This research project has been classified as quantitative-descriptive and is further sub-typed as a program evaluation study. Tripodi et al. (1970) describe program evaluation studies as those concerned with seeking the effects of a specific program (p. 139).

Exploratory studies, which are considered as the third category of research, are defined as:

Empirical research investigations which have as their purpose the formulation of a problem or a set of questions, developing hypotheses, or increasing an investigator's familiarity with a phenomenon or to lay the basis for more precise future research. (Tripodi et al., 1970, p. 255)

For the purpose of this particular research project
the researcher was concerned with seeking the effects of the Special Projects Committee; therefore, the most appropriate design was quantitative-descriptive sub-typed program evaluation.

The Focus

This research study was an attempt to assess the process used by the Special Projects Committee of United Way, Windsor-Essex County.

The Special Projects Committee attempts to evaluate new and innovative programs and determine whether or not to support the programs financially. Therefore, the research project was designed to yield empirical data on the following aspects of the Special Projects Committee.

1. How do the special project applicants perceive the purpose of the special projects grant system?

2. Do the special project applicants perceive the Special Projects Committee as being effective in meeting its specified goals?

3. Is the process of evaluating special projects of value to the applicants?

4. Is there a degree of accountability between the successful applicants of special projects and United Way and between successful applicants of special projects and the community?

5. What are the attitudes of the special project
applicants with regard to a standardized model of evaluation and whose responsibility do they believe it would be to develop and implement such a model?

6. In the opinion of the special project applicants, what degree of expertise is required by United Way staff and volunteers in order to determine which projects should obtain special project grants?

7. What are the attitudes of special project applicants toward the consultation provided by United Way?

8. What methods are used in decision-making processes?

9. What types of information should be gathered for decision making?

10. In the opinion of special project applicants, what would be needed to improve decision making?

11. What are the attitudes of special project applicants towards functional budgeting?

The research project was designed to gather information about ways in which the Special Projects Committee can conform more closely with the objectives of allocating funds for new and innovative projects.

A questionnaire was developed and distributed to applicants of special project grants from the years 1972 to 1979 for the purposes of collecting data (see Appendix B). The questionnaires were distributed to executive directors or presidents of boards of directors, since it was felt that
either of these individuals would be the persons most likely to have been involved with the applications for special projects.

In attempting to ensure that the respondents perceived the researcher and consequently the research as independent of United Way, the researcher stressed in the covering letter (Appendix A) that all information collected would be considered confidential and that specific programs or projects would not be identified. In order to obtain as accurate a picture as possible, the entire population of special projects was used in the study.

It was thought that the information collected could be used by:

a) the United Way of Windsor-Essex County for the purpose of evaluating the present Special Projects Committee process
b) the United Way of Windsor-Essex County for improving and implementing changes in the present process
c) the social work community for increasing knowledge in the area of decision making processes
d) United Ways in both Canada and the United States who utilize similar approaches for funding new and innovative programs on a short term basis.

Definition of Terms

The terms used in the context of this study by the researcher are identified and operationally defined as follows:
1. Special Project Applicants of United Way is defined as including all applicants for Special Project grants from the years 1972 to and including 1979. See Appendix D for the list of applicants.

2. Efficiency refers to the degree to which processes proceed with the fewest complications or interruptions towards objectives. In other words, efficiency is how well a program or service is administered or carried out.

3. Effectiveness refers to the degree to which a program or service achieves its stated goals and objectives.

4. Evaluation refers to the process of applying scientific procedures to accumulate reliable and valid evidence on the manner and extent to which specified activities produce effects or outcomes (Rutman, 1977, p. 16).

5. Accountability refers to the justification of a program, whether it be to United Way, the community at large, the government, or to the agency itself.

6. Existing needs refers to those needs which are recognized but nothing has been done about them (Special Projects Review, 1976, p. 6).

7. Emerging needs refers to those needs which are just developing (Special Projects Review, 1976, p. 6).

8. Innovation within existing and emerging needs is
defined as new to the community, new to the population group and new methodology (Special Projects Review, 1976, p. 6).

**Population and Sample**

In selecting the population for this research project the researcher identified all those programs or projects for which applications for Special Project grants had been made in the Windsor and Essex County area. The population was confined to this specific geographic area in order that the research study might provide United Way of Windsor-Essex County with specific recommendations for their special projects grants process. Secondly, the restrictions of time and resources on the part of the researcher limited the geographic area.

In order to obtain an accurate picture of the Special Project process, it was decided that all projects would be studied. Although there were one hundred and thirty applications, only seventy-nine agencies or programs were involved. The researcher felt that this number was not too cumbersome and, as a result, chose to use the total population.

**Instrument**

The instrument for the collection of data utilized was the questionnaire. The researcher considered other possibilities
for collecting the data, such as interviews, however it was felt that interviews would prove to be too time-consuming. The advantage of the questionnaire was not only that they would be less time-consuming but that they could reach the entire population at roughly the same moment, thus providing a degree of conformity of stimulus and hence a higher degree of validity.

The Questionnaire

The construction of the questionnaire was one of the most crucial aspects of the research design. It had to include questions that were well thought out, planned and also grouped into categories. The researcher attempted to give careful consideration to question content with specific instructions for the respondent to follow. For the most part, she attempted to use structured questions which would limit the range of responses available to respondents.

Pertinent literature on questionnaire construction was reviewed. Stephen Isaac (1974) suggests that the questionnaire requires a clear statement of the problem and that the questions should be clear and straightforward. Careful consideration should be given to the wording of the questions and the form of responses required (p. 92).

Kornhauser and Sheatsley (1976) offer six succinct stages which follow (pp. 542-546): deciding on the type of information to be sought, deciding the type of questionnaire
to be used: writing a first draft; re-examining and revising questions; pre-testing; editing and specifying procedures for the use of the questionnaire. The researcher, in designing her questionnaire, attempted to give consideration to the comments made by Isaac and the six stages suggested by Kornhauser and Sheatsley.

The Fleishman's Leadership Opinion Questionnaire was used for the five-point scale. The scale ranges from "a great deal" to "not at all" (Miller, 1964, p. 229). It was used to permit the expression of different degrees of agreement-disagreement. The scale allows for five degrees of ranking in terms of agree-disagree. The scale is of the Likert-type, a type that is most commonly used in social work research. Although this is a five-point scale, it does not measure the distance between degrees (Selltiz, Wrightsman and Cook, 1976, pp. 418-421).

The initial questionnaire was reviewed by the researcher's thesis committee. Revisions were recommended and made and subsequently the questionnaire was approved. A pretest was performed and the final draft was mailed out to all applicants of the Special Project grants. A covering letter (Appendix A) was included with the questionnaire as a means of explaining it to the respondents. A self-addressed return envelope was included with the questionnaire for easy return. The School of Social Work address was utilized to maintain confidentiality and to ensure that the respondents would not view
this as a United Way sponsored project.

A follow-up letter was mailed to respondents after three weeks to act as a reminder (Appendix C). It was anticipated that the follow-up letter would assist in increasing the percentage of returns.

The Pre-Test

Due to the time limitations placed on the researcher, it was decided that professional staff at United Way and three volunteers from the Special Projects Committee be used for the pre-test. It was also felt that the questionnaire was unique to United Way of Windsor-Essex County and therefore United Way staff and volunteers would be more familiar with the process involved in the Windsor area. The researcher's thesis committee agreed to this and the pre-test was administered to seven professional staff of United Way Windsor-Essex County and three United Way volunteers.

In administering the pre-test, the purpose of the research project was explained to the sample group and each person was instructed to assume the identity of a specific agency while filling out the questionnaire. The results of the pre-test were examined, further changes were made to the questionnaire and the final draft was mailed out June 21, 1979.

Method of Data Analysis

The Statistical Package for Social Sciences (S.P.S.S.) was utilized in identifying the statistical procedures to
tabulate and analyze the data. As the total population was used the researcher decided only descriptive statistics would be used to summarize and cross tabulate the data obtained.

Two stages were involved in the data analysis: The tabulation of frequency distributions of responses was used first to indicate a general picture of the responses. This served to reflect some general trends or patterns and led to some general conclusions. The second stage of the analysis was concerned with seeking descriptions among variables. There were seventy-one variables and many of these associations provided possibilities for investigation. Due to the time limitations, the researcher studied only those she felt were most important. These variables were then cross-tabulated.

The computer was used for the data analysis. The questionnaires were carefully checked and coded. This information was then key-punched on the computer cards and verified.

The analysis of the data was based on the questions raised in the research focus of this chapter.
CHAPTER V

DATA ANALYSIS

The data was collected through the use of a questionnaire according to the procedures which were previously described in Chapter IV in the method of data collection.

The questionnaire was designed and distributed to executive directors or boards of directors for those agencies or groups who had applied for Special Project grants from the years 1972 to and including 1979. Of the seventy-nine agencies or groups who had applied for Special Projects, the researcher was only able to obtain contacts and addresses for seventy-one agencies. Of the seventy-one questionnaires mailed, thirty-eight were returned completed and five were returned undelivered by July 31, 1979.

The researcher used the termination date of July 31, 1979 in order to complete the computer run within the time limitations involved. The percentage of returns was 53.5 percent which was considered to be good.

In general, the respondents were very co-operative and enthusiastic about the project. Some respondents contacted the researcher asking if they could obtain a copy of the results of the study.

In order to answer the research questions and relate the questionnaire to the literature, the analysis was divided
into three sections: characteristics of the population; applicants' perspective of the Special Projects process; and program evaluation and accountability.

**Characteristics of the Population**

Questions 1 to 9 yielded information relating to:
- length of agency existence;
- membership status, membership status prior to or since receiving a Special Project grant;
- number of years as a United Way member agency;
- number of times United Way membership was applied for;
- number of Special Projects applied for and received;
- annual operating budget;
- the financial dependency on United Way for funding of Special Projects;
- and the type of innovative service provided by Special Project.

Table 1 illustrates the distribution of the population by the length of existence.

The majority of the population, 22 agencies, or 64.7 per cent, had been in existence for less than 10 years, while 4 agencies, or 11.8 per cent, had been in existence less than 20 years and 8 agencies, or 23.5 per cent, had been in existence for over 20 years. The majority of agencies could then be considered as "young" agencies.

Table 2 shows the distribution according to member agency status.
Table 1

Length of Agency Existence

<table>
<thead>
<tr>
<th>Length in Years</th>
<th>Number of Agencies (N = 34)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-4</td>
<td>9</td>
<td>26.5</td>
</tr>
<tr>
<td>5-6</td>
<td>4</td>
<td>11.8</td>
</tr>
<tr>
<td>7-10</td>
<td>9</td>
<td>26.5</td>
</tr>
<tr>
<td>11-13</td>
<td>3</td>
<td>8.8</td>
</tr>
<tr>
<td>15-19</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>20 and over</td>
<td>8</td>
<td>23.5</td>
</tr>
</tbody>
</table>

Note. 4 agencies did not respond.

Table 2

Member Agency Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Number of Agencies (N = 35)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member agency</td>
<td>14</td>
<td>40</td>
</tr>
<tr>
<td>Non member agency</td>
<td>21</td>
<td>60</td>
</tr>
</tbody>
</table>

Note. 3 agencies did not respond.
Table 2 indicates that the majority, 60 per cent, of the agencies who applied for Special Project grants were non member agencies. Fourteen agencies, or 40 per cent, were member agencies.

Table 3 depicts the distribution of member agencies according to the timing of receiving membership status.

Table 3

<table>
<thead>
<tr>
<th>Timing</th>
<th>Number of Agencies (N = 12)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior to receiving Special Project</td>
<td>5</td>
<td>41.7</td>
</tr>
<tr>
<td>After receiving Special Project</td>
<td>7</td>
<td>58.3</td>
</tr>
</tbody>
</table>

Note. 2 agencies did not respond

Of the 14 member agencies, only 12 responded to this question. Of these 12 agencies 5, or 41.7 per cent, received their membership status prior to receiving a Special Projects grant. Seven agencies, or 58.3 per cent, received their membership status after receiving a Special Projects grant.

Table 4 shows the distribution of the population by years of United Way membership.
### Table 4

**Years of United Way Membership**

<table>
<thead>
<tr>
<th>Length in Years</th>
<th>Number of Agencies</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-8</td>
<td>9</td>
<td>64.3</td>
</tr>
<tr>
<td>9-19</td>
<td>3</td>
<td>21.4</td>
</tr>
<tr>
<td>20 and over</td>
<td>2</td>
<td>14.3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>14</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Nine agencies, or 64.3 per cent, have been member agencies of United Way for 8 years or less. Three agencies, or 21.4 per cent, have been member agencies for 9 to 19 years. The remaining 2 agencies, or 14.3 per cent, have been member agencies for 20 years or more. This table indicates that the majority of member agencies who have applied for Special Project grants are fairly "young" agencies.

Table 5 indicates whether or not a Special Project applicant has applied for member agency status.

### Table 5

**Application for United Way Membership**

<table>
<thead>
<tr>
<th>Application</th>
<th>Number of Agencies (N = 30)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>18</td>
<td>60</td>
</tr>
<tr>
<td>No</td>
<td>12</td>
<td>40</td>
</tr>
</tbody>
</table>

Note. 8 agencies did not respond.
Of the 30 respondents 18, or 60 per cent, had applied for United Way membership while 12, or 40 per cent, had not applied for membership. Table 5 illustrates that the majority of agencies applying for Special Projects had also applied for membership status in United Way.

Table 6 illustrates the number of applications for United Way membership status. The majority of agencies (13, or 65 per cent) have only applied for membership once. Three agencies, or 15 per cent, have applied twice and another three, or 15 per cent, have applied three times for membership. One agency, or 5 per cent of the population, has applied six times for membership.

Table 6
Number of Applications for Membership

<table>
<thead>
<tr>
<th>Number of Applications</th>
<th>Number of Agencies</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>13</td>
<td>65</td>
</tr>
<tr>
<td>2</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>15</td>
</tr>
<tr>
<td>6</td>
<td>1</td>
<td>5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>20</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

Table 7 illustrates the distribution according to the number of Special Project applications.
Table 7

Number of Special Projects Applied For

<table>
<thead>
<tr>
<th>Number of Applications</th>
<th>Number of Agencies</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>13</td>
<td>42.0</td>
</tr>
<tr>
<td>2</td>
<td>12</td>
<td>38.7</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>9.7</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>3.2</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>3.2</td>
</tr>
<tr>
<td>11</td>
<td>1</td>
<td>3.2</td>
</tr>
<tr>
<td>Total</td>
<td>31</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Note. 7 agencies did not respond.

As can be noted in Table 7, 13 agencies, or 42 per cent of the population, have applied for Special Projects once. Twelve agencies, or 38.7 per cent, have applied twice. Three agencies, or 9.7 per cent, have applied three times; one agency, or 3.2 per cent, has applied four times; one agency, or 3.2 per cent, has applied five times and one agency has applied 11 times. Thus, the majority of the population (25 agencies, or 80.7 per cent) have applied for Special Projects less than three times. The researcher surmises that one reason for this might be that identical programs are normally funded for a maximum of two years only.
Table 8 illustrates the distribution of the number of Special Projects received.

Table 8

Number of Special Project Grants Received

<table>
<thead>
<tr>
<th>Number of Grants Received</th>
<th>Number of Agencies (N = 34)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>9</td>
<td>26.5</td>
</tr>
<tr>
<td>1</td>
<td>10</td>
<td>29.4</td>
</tr>
<tr>
<td>2</td>
<td>12</td>
<td>35.3</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>8.8</td>
</tr>
</tbody>
</table>

Note. 4 agencies did not respond.

Nine agencies, or 26.5 per cent of the population, did not receive Special Project grants. Ten agencies, or 29.4 per cent, received one Special Project grant; 12 agencies, or 35.3 per cent, received two grants and 3 agencies, or 8.8 per cent, three grants. As can be noted in Table 8, the majority of agencies who applied for Special Project grants did receive them.

Table 9 indicates the distribution by percentage of agency funding levels according to the sources.

As can be noted in Table 9, 10 agencies, or 26.3 per cent, receive less than 50 per cent of their funding from United Way. Nine agencies, or 23.6 per cent, receive 50 per cent or more of their funding from United Way. It would appear
Table 9
Percentage of Agency Funding Level
According to Sources

<table>
<thead>
<tr>
<th>Percentage of Funding Level</th>
<th>Government*</th>
<th>United Way</th>
<th>Fees</th>
<th>Productive Entreprise</th>
<th>Investment</th>
<th>Other**</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>3</td>
<td>4</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>75-99</td>
<td>4</td>
<td>2</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>50-74</td>
<td>7</td>
<td>3</td>
<td>1</td>
<td>--</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>25-49</td>
<td>5</td>
<td>7</td>
<td>--</td>
<td>1</td>
<td>--</td>
<td>3</td>
</tr>
<tr>
<td>1-24</td>
<td>2</td>
<td>3</td>
<td>9</td>
<td>4</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>Total</td>
<td>21</td>
<td>19</td>
<td>10</td>
<td>5</td>
<td>2</td>
<td>16</td>
</tr>
</tbody>
</table>

* not social services
** untraditional funding
that the majority of agencies receive funding from either United Way or government sources as indicated by the mean values of 53.5 and 60.2, respectively.

Table 10 illustrates the number of agencies that were entirely dependent on United Way for funding.

Table 10

Financial Dependency on United Way for Special Project

<table>
<thead>
<tr>
<th>Dependency</th>
<th>Number of Agencies (N = 32)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entirely dependent</td>
<td>10</td>
<td>31.3</td>
</tr>
<tr>
<td>Partially dependent</td>
<td>22</td>
<td>68.7</td>
</tr>
</tbody>
</table>

Note. 6 agencies did not respond.

Ten agencies, or 31.3 per cent, were dependent on United Way for funding while the majority, 22 agencies, or 68.7 per cent, were partially dependent on United Way for funding.

While Table 10 indicates that the majority of agencies depended on other sources for funding, Table 9 indicates the specific sources that agencies receive their funding from.

Table 11 illustrates the portion of innovative service provided by the Special Project.

As can be noted in Table 11, 6 agencies, or 18.7 per cent, applied for a Special Project for the only service their agency provided. Fifteen agencies, or 46.9 per cent, applied
Table 11
Type of Innovative Service Provided by Special Project

<table>
<thead>
<tr>
<th>Type of Innovative Service</th>
<th>Number of Agencies (N = 32)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only service provided</td>
<td>6</td>
<td>18.7</td>
</tr>
<tr>
<td>New service</td>
<td>15</td>
<td>46.9</td>
</tr>
<tr>
<td>Part of existing service</td>
<td>10</td>
<td>31.2</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Note. 6 agencies did not respond.

for a new service and 10 agencies, or 26.3 per cent, applied for part of the existing service provided by their agency. One agency, or 2.6 per cent, provided a combination of service.

Summary

The majority of the agencies who responded to the questionnaire (64.7 per cent) had been in existence less than 10 years. It was noted that 60 per cent of the agencies who applied for Special Projects were not member agencies of United Way. Of the member agencies, 58.3 per cent had become member agencies after receiving a Special Project grant.

Although 60 per cent of the respondents were not member agencies, 60 per cent had applied for membership status
in United Way.

The majority of the population, or 80.7 per cent, had applied for Special Projects less than three times. Only 31.3 per cent were entirely dependent on United Way for funding of their Special Project.

In regard to the total agency budget, the majority of agencies received funding from either United Way (53.5 mean value) or government sources (60.2 mean value).

Fifteen agencies, or 46.9 per cent of the respondents, had applied for Special Projects for a new service.

**Applicants' Perspective of Special Projects Process**

Questions 10 to 24 yielded information relating to: respondents' view of intent of United Way in funding Special Projects; objectivity of the Special Projects process; consultation provided by United Way professional staff; assessment of reasons for not receiving funding; expertise of panel members and United Way staff; expertise required by panel members and United Way staff; accomplishment of objectives; discussion of application with panel members; and documentation of need.

Table 12 illustrates the respondents' view of the intent of United Way in funding Special Projects.

The majority of the respondents (65.8 per cent) rated the following extremely high: (1) funding of new and innovative projects, and (2) meeting emerging needs. It was
<table>
<thead>
<tr>
<th>Intent</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
<th>Mean Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Fund new and innovative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4.2</td>
</tr>
<tr>
<td>projects</td>
<td>19</td>
<td>6</td>
<td>1</td>
<td>3</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Meet emerging needs</td>
<td>10</td>
<td>15</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>7</td>
<td>3.9</td>
</tr>
<tr>
<td>3. One time funding</td>
<td>4</td>
<td>2</td>
<td>11</td>
<td>9</td>
<td>3</td>
<td>9</td>
<td>2.8</td>
</tr>
<tr>
<td>programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Fund risk</td>
<td></td>
<td></td>
<td>2</td>
<td>3</td>
<td>6</td>
<td></td>
<td>2.1</td>
</tr>
<tr>
<td>membership</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Means to secure membership</td>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>5</td>
<td>1</td>
<td>1.9</td>
</tr>
<tr>
<td>6. Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>37</td>
<td>1</td>
<td>2.0</td>
</tr>
</tbody>
</table>
generally felt that the intent of United Way in funding Special Projects was not seen as a means to secure membership. Only 3 agencies rated "means to secure membership" as being high.

Table 13 illustrates the respondents' rating on the objectivity of the Special Projects Committee process.

<table>
<thead>
<tr>
<th>Degree of Objectivity</th>
<th>Number of Agencies (N = 32)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>8</td>
<td>25.0</td>
</tr>
<tr>
<td>fairly much</td>
<td>13</td>
<td>40.6</td>
</tr>
<tr>
<td>to some degree</td>
<td>8</td>
<td>25.0</td>
</tr>
<tr>
<td>comparatively little</td>
<td>2</td>
<td>6.3</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>--</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Note. 6 agencies did not respond.

Twenty-one agencies, or 65.6 per cent, rated this question as high. The responses were divided between "a great deal" and "fairly much", with the majority, 40.6 per cent, rating "fairly much". The mean value of 4.0 confirms this attitude.
Table 14 illustrates the number of times United Way professional staff was consulted by agencies.

<table>
<thead>
<tr>
<th>Number of Times</th>
<th>Number of Agencies (N = 28)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2</td>
<td>7.1</td>
</tr>
<tr>
<td>1</td>
<td>5</td>
<td>17.9</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>7.1</td>
</tr>
<tr>
<td>3</td>
<td>4</td>
<td>14.3</td>
</tr>
<tr>
<td>4</td>
<td>7</td>
<td>25.0</td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>17.9</td>
</tr>
<tr>
<td>7</td>
<td>1</td>
<td>3.6</td>
</tr>
<tr>
<td>11</td>
<td>2</td>
<td>7.1</td>
</tr>
</tbody>
</table>

Note. 10 agencies did not respond.

Two agencies, or 7.1 per cent, did not consult United Way professional staff. Five agencies, or 17.9 per cent, consulted with United Way once, 2 agencies, or 7.1 per cent, consulted twice, 4 agencies, or 14.3 per cent, consulted with United Way 3 times, and 7 agencies, or 25.0 per cent, consulted with United Way 4 times. Thus, the majority of agencies consulted with United Way less than 5 times in a given year regarding their Special Project application.
Table 15 illustrates the respondents' rating on degree of helpfulness provided by United Way consultation.

Table 15

Respondents' Rating on Degree of Helpfulness
Provided by United Way Consultation

<table>
<thead>
<tr>
<th>Degrees of Helpfulness</th>
<th>Number of Agencies (n = 26)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>12</td>
<td>46.2</td>
</tr>
<tr>
<td>fairly much</td>
<td>3</td>
<td>11.5</td>
</tr>
<tr>
<td>to some degree</td>
<td>6</td>
<td>23.1</td>
</tr>
<tr>
<td>comparatively little</td>
<td>4</td>
<td>15.4</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>3.8</td>
</tr>
</tbody>
</table>

Note. 12 agencies did not respond.

Twelve agencies, or 46.2 per cent of the respondents, rated the degree of helpfulness by United Way as "a great deal". Three agencies, or 11.5 per cent, rated the degree of helpfulness as "fairly much". Six agencies, or 23.1 per cent, rated the degree of helpfulness as "to some degree".

In comparing the mean values of the number of times agencies consulted United Way with the degree of helpfulness, it can be noted that the mean value for the number of times is 3.6 and the mean value for degree of helpfulness is 4.1.
Thus, the number of times consultation was used relates to the degree of helpfulness.

Table 16 illustrates the respondents' rating on the degree of helpfulness provided by additional United Way consultation.

Table 16

Respondents' Rating on Degree of Helpfulness Provided by Additional United Way Consultation

<table>
<thead>
<tr>
<th>Degree of Helpfulness</th>
<th>Number of Agencies (N = 23)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>4</td>
<td>17.4</td>
</tr>
<tr>
<td>fairly much</td>
<td>9</td>
<td>39.1</td>
</tr>
<tr>
<td>to some degree</td>
<td>6</td>
<td>26.1</td>
</tr>
<tr>
<td>comparatively little</td>
<td>2</td>
<td>8.7</td>
</tr>
<tr>
<td>not at all</td>
<td>1</td>
<td>4.3</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>4.3</td>
</tr>
</tbody>
</table>

Note. 15 agencies did not respond.

Of the agencies who received additional consultation, 4, or 17.4 per cent, rated the degree of helpfulness as "a great deal". Nine agencies, or 39.1 per cent, rated the degree of helpfulness as "fairly much" and 6 agencies, or 26.1 per cent, rated the degree of helpfulness as "to some degree".

It would appear from Tables 15 and 16 that the majority
of agencies (56.7 and 56.5 per cent) found the degree of helpfulness provided by United Way consultation to be split between "a great deal" and "fairly much".

Table 17 illustrates the respondents' assessment of reasons for not receiving a Special Project grant.

Table 17
Assessment of Reasons for Not Receiving a Special Project Grant

<table>
<thead>
<tr>
<th>Reasons</th>
<th>Number of Agencies (N = 21)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>inadequate documentation of need</td>
<td>4</td>
<td>19.0</td>
</tr>
<tr>
<td>no volunteer component</td>
<td>3</td>
<td>14.2</td>
</tr>
<tr>
<td>lack of clarity re goals and objectives</td>
<td>3</td>
<td>14.2</td>
</tr>
<tr>
<td>availability of alternate funding</td>
<td>3</td>
<td>14.2</td>
</tr>
<tr>
<td>not innovative</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>duplication of service</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>bias</td>
<td>1</td>
<td>4.8</td>
</tr>
<tr>
<td>inadequate organizational capability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>inadequate fiscal control</td>
<td></td>
<td></td>
</tr>
<tr>
<td>program too risky</td>
<td></td>
<td></td>
</tr>
<tr>
<td>not new</td>
<td></td>
<td></td>
</tr>
<tr>
<td>other</td>
<td>5</td>
<td>23.8</td>
</tr>
</tbody>
</table>
Of those respondents who did not receive a Special Project grant, 14 agencies, or 36.8 per cent, stated that the reasons for not receiving funding were made known to them.

As can be noted in Table 17, 4 agencies, or 19.0 per cent of the respondents, felt that the reason they did not receive funding was because of inadequate documentation of need. Three agencies, or 14.2 per cent, listed "no volunteer component" as the reason they did not receive funding. Another 3 agencies, or 14.2 per cent, listed "lack of clarity re goals and objectives" as the reason they did not receive funding. "Availability of alternate funding" was the reason for 3 agencies, or 14.2 per cent, not receiving funding. "Not innovative", "duplication of service" and "bias" were each listed by one agency, or 4.8 per cent of the respondents. Five agencies, or 23.8 per cent, listed "other" reasons (committee did not relate to need, no need, third funding attempt) for not receiving funding.

Table 18 illustrates the respondents' rating on the degree of expertise contributed by United Way volunteers to the Special Projects process.

Two agencies, or 6.5 per cent, rated the degree of expertise contributed as "a great deal", while 12 agencies, or 38.7 per cent of the respondents, rated the degree of expertise contributed as "fairly much". Ten agencies, or 32.3 per cent, rated the degree of expertise as "to some degree". Three agencies, or 9.7 per cent, rated the degree
of expertise as "comparatively little" and 4 agencies, or 12.9 per cent of the respondents, were "not sure" of the degree of expertise provided by United Way volunteers.

The majority of the respondents (77.5 per cent) felt that United Way volunteers did contribute some degree of expertise towards the Special Projects process.

Table 18
Respondents' Rating on Degree of Expertise Contributed by United Way Volunteers

<table>
<thead>
<tr>
<th>Degree of Expertise</th>
<th>Number of Agencies (N = 31)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>2</td>
<td>6.5</td>
</tr>
<tr>
<td>fairly much</td>
<td>12</td>
<td>38.7</td>
</tr>
<tr>
<td>to some degree</td>
<td>10</td>
<td>32.3</td>
</tr>
<tr>
<td>comparatively little</td>
<td>3</td>
<td>9.7</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>4</td>
<td>12.9</td>
</tr>
</tbody>
</table>

Note. 7 agencies did not respond.

Table 19 shows respondents' rating on the kind of expertise required by Special Projects panel members.

As indicated by Table 19, 20 agencies, or 52.6 per cent, felt knowledge of emerging needs was an important area of expertise required for Special Projects panel members. Seven agencies, or 18.4 per cent, felt that knowledge of particular
<table>
<thead>
<tr>
<th>Expertise</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
<th>Mean Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Knowledge of emerging needs</td>
<td>20</td>
<td>7</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4.1</td>
</tr>
<tr>
<td></td>
<td>52.6%</td>
<td>18.4%</td>
<td>5.3%</td>
<td>5.3%</td>
<td>7.9%</td>
<td>10.5%</td>
<td></td>
</tr>
<tr>
<td>2. Knowledge of particular</td>
<td>7</td>
<td>11</td>
<td>5</td>
<td>3</td>
<td>6</td>
<td>6</td>
<td>3.3</td>
</tr>
<tr>
<td>project</td>
<td>18.4%</td>
<td>28.9%</td>
<td>13.2%</td>
<td>7.9%</td>
<td>15.8%</td>
<td>15.8%</td>
<td></td>
</tr>
<tr>
<td>3. Knowledge of budgeting</td>
<td>5</td>
<td>5</td>
<td>12</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>3.0</td>
</tr>
<tr>
<td></td>
<td>13.2%</td>
<td>13.2%</td>
<td>31.6%</td>
<td>13.2%</td>
<td>13.2%</td>
<td>15.8%</td>
<td></td>
</tr>
<tr>
<td>4. Knowledge of social services</td>
<td>4</td>
<td>8</td>
<td>9</td>
<td>8</td>
<td>3</td>
<td>6</td>
<td>3.1</td>
</tr>
<tr>
<td></td>
<td>10.5%</td>
<td>21.1%</td>
<td>23.7%</td>
<td>21.1%</td>
<td>7.9%</td>
<td>15.8%</td>
<td></td>
</tr>
<tr>
<td>5. Comprehension of organizational functioning</td>
<td>4</td>
<td>7</td>
<td>8</td>
<td>7</td>
<td>7</td>
<td>5</td>
<td>2.8</td>
</tr>
<tr>
<td></td>
<td>10.5%</td>
<td>18.4%</td>
<td>21.1%</td>
<td>18.4%</td>
<td>18.4%</td>
<td>13.2%</td>
<td></td>
</tr>
<tr>
<td>6. Other</td>
<td>-</td>
<td>-</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>34</td>
<td>2.0</td>
</tr>
<tr>
<td></td>
<td>-</td>
<td>-</td>
<td>2.6%</td>
<td>5.3%</td>
<td>2.6%</td>
<td>89.5%</td>
<td></td>
</tr>
</tbody>
</table>
projects was an important area of expertise for panel members and five agencies, or 13.2 per cent, felt that knowledge of budgeting was an important area of expertise for panel members. "Knowledge of social services", "comprehension of organizational functioning" and "other" were not rated as high by the majority of the respondents.

Table 20 illustrates the respondents' rating on the degree of expertise contributed by United Way professional staff.

Table 20
Respondents' Rating on Degree of Expertise Contributed by United Way Professional Staff

<table>
<thead>
<tr>
<th>Degree of Expertise</th>
<th>Number of Agencies (N = 33)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>11</td>
<td>33.3</td>
</tr>
<tr>
<td>fairly much</td>
<td>8</td>
<td>24.2</td>
</tr>
<tr>
<td>to some degree</td>
<td>9</td>
<td>27.3</td>
</tr>
<tr>
<td>comparatively little</td>
<td>2</td>
<td>6.1</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>3</td>
<td>9.1</td>
</tr>
</tbody>
</table>

Note. 5 agencies did not respond.

Table 20 indicates that 11 agencies, or 33.3 per cent, felt that the degree of expertise contributed by United Way professional staff was "a great deal". Eight agencies, or
24.2 per cent, felt the degree of expertise was "fairly much", while 9 agencies, or 27.3 per cent, felt the degree of expertise was "to some degree".

The ratings on the degree of expertise contributed by United Way professional staff is somewhat higher than the degree of expertise contributed by panel members. The researcher speculates that one reason for this might be that agencies have more contact with United Way professional staff.

Table 21 illustrates the respondents' rating on the kind of expertise required by United Way professional staff.

The results of this question indicate that 24 agencies, or 63.2 per cent, felt that knowledge of emerging needs was an important area of expertise required for United Way professional staff. Twelve agencies, or 31.6 per cent, felt that knowledge of social services was important, and 7 agencies, or 18.4 per cent, felt that knowledge of budgeting was an important area of expertise for United Way professional staff.

The majority of respondents did not see the following as being an important area of expertise for professional staff: "knowledge of particular project", and "comprehension of organizational functioning". Nor did they indicate any "other" area of expertise as being important for professional staff.

The Special Projects Committee is responsible for making recommendations regarding the disbursement of funds to new and innovative projects. Table 22 illustrates the respondents' rating on the degree to which the Special Projects
### Table 21

Kind of Expertise Required by United Way Professional Staff

<table>
<thead>
<tr>
<th>Expertise</th>
<th>5</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
<th>0</th>
<th>Mean Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Knowledge of emerging needs</td>
<td>24</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>7</td>
<td>4.6</td>
</tr>
<tr>
<td></td>
<td>63.2%</td>
<td>10.5%</td>
<td>2.6%</td>
<td>2.6%</td>
<td>2.6%</td>
<td>18.4%</td>
<td></td>
</tr>
<tr>
<td>2. Knowledge of social services</td>
<td>12</td>
<td>9</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>8</td>
<td>3.7</td>
</tr>
<tr>
<td></td>
<td>31.6%</td>
<td>23.7%</td>
<td>7.9%</td>
<td>5.3%</td>
<td>10.5%</td>
<td>21.1%</td>
<td></td>
</tr>
<tr>
<td>3. Knowledge of budgeting</td>
<td>7</td>
<td>3</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>8</td>
<td>3.0</td>
</tr>
<tr>
<td></td>
<td>18.4%</td>
<td>7.9%</td>
<td>26.3%</td>
<td>13.2%</td>
<td>13.2%</td>
<td>21.1%</td>
<td></td>
</tr>
<tr>
<td>4. Knowledge of particular</td>
<td>4</td>
<td>11</td>
<td>5</td>
<td>7</td>
<td>5</td>
<td>6</td>
<td>3.0</td>
</tr>
<tr>
<td>project</td>
<td>10.5%</td>
<td>28.9%</td>
<td>13.2%</td>
<td>18.4%</td>
<td>13.2%</td>
<td>15.8%</td>
<td></td>
</tr>
<tr>
<td>5. Comprehension of organiza-</td>
<td>3</td>
<td>4</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>7</td>
<td>2.5</td>
</tr>
<tr>
<td>tional functioning</td>
<td>7.9%</td>
<td>10.5%</td>
<td>21.1%</td>
<td>21.1%</td>
<td>21.1%</td>
<td>18.4%</td>
<td></td>
</tr>
<tr>
<td>6. Other</td>
<td>−</td>
<td>−</td>
<td>−</td>
<td>2</td>
<td>1</td>
<td>35</td>
<td>1.7</td>
</tr>
<tr>
<td></td>
<td>−</td>
<td>−</td>
<td>−</td>
<td>5.3%</td>
<td>2.6%</td>
<td>92.1%</td>
<td></td>
</tr>
</tbody>
</table>
Table 22

Respondents' Rating on Degree to Which Special Projects Committee Meet Stated Objectives

<table>
<thead>
<tr>
<th>Degree of Meeting Objectives</th>
<th>Number of Agencies (N = 33)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>8</td>
<td>24.2</td>
</tr>
<tr>
<td>fairly much</td>
<td>12</td>
<td>36.4</td>
</tr>
<tr>
<td>to some degree</td>
<td>9</td>
<td>27.3</td>
</tr>
<tr>
<td>comparatively little</td>
<td>1</td>
<td>3.0</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>3</td>
<td>9.1</td>
</tr>
</tbody>
</table>

Note. 5 agencies did not respond.

Committee meets its stated objective.

The majority of agencies (87.9 per cent) felt that the Special Projects Committee did meet its objective. However, the mean value of 4.3 indicates that they were not in total agreement on this point. Nine point one per cent of the respondents were not sure if the Special Projects Committee met its objective and only one agency, or 3.0 per cent, felt that the Special Projects Committee met its objective "comparatively little".

Table 23 illustrates the respondents' rating on the degree of information provided on the Special Projects application forms. The respondents were asked if they felt enough
information was provided on the application for the panel members. (See Appendix E for copy of application form.)

Table 23

Respondents' Rating on Degree of Information Provided on Application Forms

<table>
<thead>
<tr>
<th>Degree of Information Provided</th>
<th>Number of Agencies (N = 31)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>3</td>
<td>9.7</td>
</tr>
<tr>
<td>fairly much</td>
<td>8</td>
<td>25.8</td>
</tr>
<tr>
<td>to some degree</td>
<td>11</td>
<td>35.5</td>
</tr>
<tr>
<td>comparatively little</td>
<td>2</td>
<td>6.5</td>
</tr>
<tr>
<td>not at all</td>
<td>2</td>
<td>6.5</td>
</tr>
<tr>
<td>not sure</td>
<td>5</td>
<td>16.1</td>
</tr>
</tbody>
</table>

Note. 7 agencies did not respond.

Three agencies, or 9.7 per cent, felt enough information was provided. Eight agencies, or 25.8 per cent, felt "fairly much" was provided and 11 agencies, or 35.5 per cent, felt that information was provided "to some degree". This suggests that the majority of respondents felt that there is room for improvement or refinement in the application forms before they are totally acceptable.

Table 24 illustrates the respondents' rating on the degree of opportunity to discuss the application with the
Special Projects panel.

Table 24

Respondents' Rating on Degree of Opportunity to Discuss Application Form with Special Projects Panel

<table>
<thead>
<tr>
<th>Degree of Opportunity</th>
<th>Number of Agencies (N = 31)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>13</td>
<td>41.9</td>
</tr>
<tr>
<td>fairly much</td>
<td>7</td>
<td>22.6</td>
</tr>
<tr>
<td>to some degree</td>
<td>3</td>
<td>9.7</td>
</tr>
<tr>
<td>comparatively little</td>
<td>4</td>
<td>12.9</td>
</tr>
<tr>
<td>not at all</td>
<td>1</td>
<td>3.2</td>
</tr>
<tr>
<td>not sure</td>
<td>3</td>
<td>9.7</td>
</tr>
</tbody>
</table>

Note. 7 agencies did not respond.

Thirteen agencies, or 41.9 per cent of the respondents, felt that there was "a great deal" of opportunity to discuss the application with the panel. Seven agencies, or 22.6 per cent, felt that there was "fairly much" of an opportunity to discuss the application with the panel. Thus, the majority, or 69.5 per cent of the respondents, felt highly positive regarding the opportunity to discuss their application with the Special Projects panel. However, four agencies, or 12.9 per cent of the respondents, felt that there was "comparatively little" opportunity to discuss their application.

The rating on this question would apply to the
respondents' experience with individual panels. It would appear that overall, respondents are satisfied with panel members and the opportunity to discuss the application form.

Table 25 illustrates the distribution by respondents' rating on the degree of adequately documenting the need.

Table 25
Respondents' Rating on Own Degree of Adequately Documenting Need

<table>
<thead>
<tr>
<th>Degree of Documenting Need</th>
<th>Number of Agencies (N = 30)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>13</td>
<td>43.3</td>
</tr>
<tr>
<td>fairly much</td>
<td>12</td>
<td>40.0</td>
</tr>
<tr>
<td>to some degree</td>
<td>5</td>
<td>16.7</td>
</tr>
<tr>
<td>comparatively little</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Note. 8 agencies did not respond.

Thirteen agencies, or 43.3 per cent of the respondents, felt that they had adequately documented the need to which they were addressing themselves. Twelve agencies, or 40.0 per cent, felt that they had documented the need "fairly much" and 5 agencies, or 16.7 per cent, felt that they had documented the need "to some degree". The majority of those who responded
to this question felt that they had adequately documented the need to which they were addressing themselves.

**Summary**

The section on applicants' perspective of the Special Projects process indicates that overall, the respondents feel positive towards the Special Projects process.

The majority of respondents view the intent of United Way in funding Special Projects as: "funding of new and innovative projects" and "to meet emerging needs".

Sixty-five point six per cent of the respondents felt that the Special Projects process was an objective one. The majority of agencies consulted with United Way regarding their Special Project and felt that the consultation was helpful.

In assessing the reasons for not receiving funding for a Special Project, "inadequate documentation of need", "no volunteer component", "lack of clarity re goals and objectives" and "availability of alternate funding" were listed by the majority of respondents.

Although the respondents felt positively towards the contribution by volunteers and United Way staff, there appears to be room for some improvement. Knowledge of emerging needs was ranked highest by the respondents regarding the kind of expertise they felt was required by both volunteer and professional staff. Thus, it appears in this area in particular,
improvement could take place.

The majority of respondents (87.9 per cent) felt that the Special Project Committee met its stated objective.

It would seem that although the majority of agencies felt that the application forms were adequate in providing information, there is still room for some improvement. The majority of the respondents rated the opportunity to discuss their application with the panel as fairly high. The researcher assumes that the combination of the quality of the application form and the opportunity to discuss the application with the panel are two important priorities which add to the process. This might account for the high rating on question 23 regarding the opportunity to discuss the application.

The data clearly indicate that the majority of applicants felt they had adequately documented the need to which they were addressing themselves.

Program Evaluation and Accountability

The data collected in this final section was derived from questions 25 to 36. Information was provided relating to: accountability; authority of United Way to question program effectiveness; responsibility of who should develop a model to evaluate program effectiveness; the degree to which an evaluation model would prove helpful to Special Project recipients; the degree to which an evaluation model would
ensure that Special Projects meet their objectives; and respondents' view of Special Projects.

Table 26 depicts the comparison of the mean values of the respondents' rating on: a) degree of accountability of United Way to the community for the use of its Special Project grants; b) degree of accountability of Special Project recipients to the community; and c) degree of accountability of Special Project recipients to United Way.

Table 26
Comparison of the Mean Values of Ratings on United Way and Special Projects Accountability

<table>
<thead>
<tr>
<th>Accountability</th>
<th>Mean Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Way accountability for Special Projects to the community</td>
<td>4.0</td>
</tr>
<tr>
<td>Special Projects accountability to the community</td>
<td>4.2</td>
</tr>
<tr>
<td>Special Projects accountability to United Way</td>
<td>4.4</td>
</tr>
</tbody>
</table>

The findings suggest that United Way should be accountable to the community for the use of its Special Projects grants. The majority of respondents feel more accountable to United Way than the community in accounting for the use of Special Projects funds.

Question 26, which asked if United Way should supervise the agency use of Special Project funds, notes that the majority
of respondents (71.1 per cent) felt that United Way should supervise the agency use of special project funds. This may account for the reason that the respondents felt United Way should be accountable to the community for the use of its Special Projects grants and the reason agencies felt more accountable to United Way.

Table 27 illustrates the respondents' rating on the degree of authority United Way has in questioning the program effectiveness of a Special Project.

Table 27.
Respondents' Ratings on Degree of Authority of United Way to Question Program Effectiveness

<table>
<thead>
<tr>
<th>Degree of Authority</th>
<th>Number of Agencies (N = 29)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>8</td>
<td>27.6</td>
</tr>
<tr>
<td>fairly much</td>
<td>8</td>
<td>27.6</td>
</tr>
<tr>
<td>to some degree</td>
<td>8</td>
<td>27.6</td>
</tr>
<tr>
<td>comparatively little</td>
<td>4</td>
<td>13.8</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Note. 9 agencies did not respond.

The majority, or 82.8 per cent of the respondents, felt that United Way does have authority to question the program
effectiveness of its Special Projects. Thirteen point eight per cent felt that United Way had "comparatively little" authority to question its Special Projects and 3.4 per cent were "not sure".

Table 28 illustrates the respondents' rating on who should be responsible for developing a model to evaluate program effectiveness.

Table 28
Respondents' Rating on Who Should be Responsible for Developing A Model to Evaluate Program Effectiveness

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Number of Agencies (N = 33)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Way</td>
<td>2</td>
<td>6.1</td>
</tr>
<tr>
<td>United Way and agencies jointly</td>
<td>22</td>
<td>66.7</td>
</tr>
<tr>
<td>Academic institution</td>
<td>2</td>
<td>6.1</td>
</tr>
<tr>
<td>Social work profession</td>
<td>3</td>
<td>9.1</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>12.1</td>
</tr>
</tbody>
</table>

Note. 5 agencies did not respond.

Twenty-two agencies, or 66.7 per cent of the respondents, felt that United Way and agencies jointly should be responsible for developing a standardized model to evaluate program effectiveness. Two agencies, or 6.1 per cent, felt United Way
should be responsible, two agencies, or 6.1 per cent, felt that academic institutions should be responsible and three agencies, or 9.1 per cent, felt the Social Work profession should be responsible.

Table 29 illustrates the respondents' rating on the degree that an evaluation model can prove helpful to Special Project recipients.

<table>
<thead>
<tr>
<th>Degree of Helpfulness</th>
<th>Number of Agencies (N = 29)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>13</td>
<td>44.8</td>
</tr>
<tr>
<td>fairly much</td>
<td>7</td>
<td>24.1</td>
</tr>
<tr>
<td>to some degree</td>
<td>5</td>
<td>17.2</td>
</tr>
<tr>
<td>comparatively little</td>
<td>1</td>
<td>3.4</td>
</tr>
<tr>
<td>not at all</td>
<td>2</td>
<td>6.9</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Note. 9 agencies did not respond.

The majority of respondents (13 agencies, or 44.8 per cent) felt that an evaluation model would help "a great deal". Seven agencies, or 24.1 per cent, felt that an evaluation model would help "fairly much" and 5 agencies, or 17.2 per cent,
felt an evaluation model would help "to some degree". One agency, or 3.4 per cent, viewed an evaluation model as helping "comparatively little" and 2 agencies, or 6.9 per cent, viewed an evaluation model as not helping at all.

Tables 28 and 29 suggest that agencies view an evaluation model as important and that United Way and the agencies should develop the model together.

Table 30 illustrates the respondents' rating on the degree an evaluation model would provide United Way with a means to ensure that Special Projects are meeting their objectives.

Table 30
Respondents' Rating on Degree An Evaluation Model would Provide United Way with a Means to Ensure that Special Projects Meet Objectives

<table>
<thead>
<tr>
<th>Degree of Ensuring</th>
<th>Number of Agencies (N = 33)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>10</td>
<td>30.3</td>
</tr>
<tr>
<td>fairly much</td>
<td>13</td>
<td>39.4</td>
</tr>
<tr>
<td>to some degree</td>
<td>5</td>
<td>15.2</td>
</tr>
<tr>
<td>comparatively little</td>
<td>2</td>
<td>6.1</td>
</tr>
<tr>
<td>not at all</td>
<td>2</td>
<td>6.1</td>
</tr>
<tr>
<td>not sure</td>
<td>3</td>
<td>9.1</td>
</tr>
</tbody>
</table>

Note: 5 agencies did not respond.
Ten agencies, or 30.3 per cent of the respondents, felt that an evaluation model would assist "a great deal" in ensuring that Special Projects meet their objectives. Thirteen agencies, or 39.4 per cent, felt that such a model would assist "fairly much" and 5 agencies, or 15.2 per cent, felt "to some degree". Two agencies, or 6.1 per cent, felt a model would help "comparatively little" and 3 agencies, or 9.1 per cent, were "not sure".

Table 31 illustrates the respondents' rating on the degree Special Projects help to meet emerging needs.

Sixteen agencies, or 47.1 per cent of the respondents, felt that Special Projects help to meet emerging needs "a great deal". Seven agencies, or 20.6 per cent, felt "fairly much" and 9 agencies, or 26.5 per cent, felt that Special Projects help to meet emerging needs "to some degree". Thus, the majority of the respondents (94.2 per cent) felt positive towards Special Projects meeting emerging needs in the community.

Table 32 illustrates the respondents' rating on the degree obtaining Special Projects should guarantee membership in United Way in the future.

Fourteen agencies, or 41.2 per cent of the respondents, felt that obtaining Special Projects should guarantee membership in United Way in the future. Sixteen agencies, or 47.1 per cent of the respondents, did not feel that obtaining Special Projects should guarantee membership in United Way
Table 31
Respondents' Rating on Degree Special Projects Help to Meet Emerging Needs

<table>
<thead>
<tr>
<th>Degree of Meeting Emerging Needs</th>
<th>Number of Agencies (N = 34)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>16</td>
<td>47.1</td>
</tr>
<tr>
<td>fairly much</td>
<td>7</td>
<td>20.6</td>
</tr>
<tr>
<td>to some degree</td>
<td>9</td>
<td>26.5</td>
</tr>
<tr>
<td>comparatively little</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>not at all</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>2.9</td>
</tr>
</tbody>
</table>

Note. 4 agencies did not respond.
Table 32  
Respondents' Rating on Degree Obtaining Special Projects Should Guarantee Membership

<table>
<thead>
<tr>
<th>Degree of Guarantee</th>
<th>Number of Agencies (N = 34)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>3</td>
<td>8.8</td>
</tr>
<tr>
<td>fairly much</td>
<td>2</td>
<td>5.9</td>
</tr>
<tr>
<td>to some degree</td>
<td>9</td>
<td>28.5</td>
</tr>
<tr>
<td>comparatively little</td>
<td>3</td>
<td>8.8</td>
</tr>
<tr>
<td>not at all</td>
<td>16</td>
<td>47.1</td>
</tr>
<tr>
<td>not sure</td>
<td>1</td>
<td>2.9</td>
</tr>
</tbody>
</table>

Note. 4 agencies did not respond.
in the future. On this question it would appear that the majority of the respondents do not agree and that this is an area where clarification by United Way is needed.

Table 33 illustrates the respondents' rating on the degree of necessity of functional budgeting for Special Projects.

Table 33
Respondents' Rating on Degree of Necessity of Functional Budgeting

<table>
<thead>
<tr>
<th>Degree of Necessity</th>
<th>Number of Agencies (N = 34)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>10</td>
<td>29.4</td>
</tr>
<tr>
<td>fairly much</td>
<td>11</td>
<td>32.4</td>
</tr>
<tr>
<td>to some degree</td>
<td>6</td>
<td>17.6</td>
</tr>
<tr>
<td>comparatively little</td>
<td>1</td>
<td>2.9</td>
</tr>
<tr>
<td>not at all</td>
<td>2</td>
<td>5.9</td>
</tr>
<tr>
<td>not sure</td>
<td>4</td>
<td>11.8</td>
</tr>
</tbody>
</table>

Note. 4 agencies did not respond.

The majority of respondents (79.4 per cent) felt the functional budgeting was necessary of Special Projects. On the other hand, 8.8 per cent of the respondents did not think functional budgeting was necessary for Special Projects.

Table 34 illustrates the respondents' rating on the question: "Are the standards for Special Projects too low?"
Table 34

Respondents' Rating of Question: "Are Standards too Low?"

<table>
<thead>
<tr>
<th>Standards too low</th>
<th>Number of Agencies (N = 32)</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>a great deal</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>fairly much</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>to some degree</td>
<td>4</td>
<td>12.5</td>
</tr>
<tr>
<td>comparatively little</td>
<td>2</td>
<td>6.3</td>
</tr>
<tr>
<td>not at all</td>
<td>15</td>
<td>46.9</td>
</tr>
<tr>
<td>not sure</td>
<td>11</td>
<td>34.4</td>
</tr>
</tbody>
</table>

Note. 6 agencies did not respond.

Fifteen agencies, or 46.9 per cent of the respondents, did not feel that the standards were too low. Two agencies, or 6.3 per cent, felt "comparatively little" and 4 agencies, or 12.5 per cent, felt "to some degree". Eleven agencies, or 34.4 per cent, were "not sure" if the standards for Special Projects were too low. Thus, the majority of the respondents appear to be satisfied with the standards of Special Projects.

Summary

The section on program evaluation and accountability illustrates a strong desire for accountability by Special Projects to both United Way and the community at large.
However, Special Projects feel a stronger desire to account to United Way.

The majority of respondents (82.8 per cent) felt that United Way does, in fact, have the authority to question the program effectiveness of Special Projects.

The data clearly indicated that the respondents felt a standardized evaluation model would prove helpful to Special Project recipients and that United Way and agencies jointly should develop an evaluation model. The respondents also felt that an evaluation model would assist United Way in ensuring that Special Project recipients met their objectives.

The overall view of the respondents is that Special Projects do help to meet emerging needs in the community.

The data shows that there was no agreement on the question of "Should obtaining Special Projects guarantee membership in United Way in the future?".

The respondents felt that functional budgeting was necessary for Special Projects and that in general the standards of Special Projects were not too low.
CHAPTER VI

RECOMMENDATIONS AND CONCLUSIONS

The purpose of this research project was to examine the process used by the Special Projects Committee of United Way of Windsor-Essex County to evaluate the effectiveness and efficiency of new and innovative projects and to allocate appropriate funds to those agencies which meet the criteria.

It was hoped that the resulting information would assist United Way in improving the process of Special Projects. In addition, attitudes toward the development of a standardized model to evaluate program effectiveness were assessed.

A review of the literature was conducted to gain familiarity with the various aspects of decision-making processes and those issues which affect it.

A research methodology was designed and a questionnaire was developed to collect data on the various aspects of the process used by the Special Projects Committee. The questionnaire was administered to applicants of Special Projects from the years 1972 to and including 1979. Data was obtained from thirty-eight responding agencies.
Major Findings

The major findings are summarized below. They have been listed in sequence as they relate to the questionnaire.

1. The majority of agencies who apply for Special Projects have been in existence less than 10 years, therefore can be considered "young" agencies.

2. The majority of agencies (60 per cent) who applied for Special Projects were not member agencies of United Way, although most agencies had applied for membership.

3. Of the agencies who were members of United Way, 40 per cent received their membership after receiving a Special Project.

4. The majority of agencies who applied for Special Projects received funding from either United Way or government sources.

5. The majority of agencies view the intent of United Way in funding special projects as "funding new and innovative projects" and "meeting emerging needs".

6. The process used by the Special Projects Committee is viewed as an objective one.

7. Consultation provided by United Way is seen in a positive manner.

8. The applicants' assessments of the reasons for not receiving a Special Project grant seem to comply with the reasons as outlined by United Way.
9. Expertise contributed by United Way volunteers and staff is viewed by the applicants in a positive light.

10. The majority of applicants felt that knowledge of emerging needs was a high priority for United Way staff and volunteers.

11. Agencies were in agreement that the Special Projects Committee as it presently exists meets its objectives.

12. Some improvement on the Special Projects application forms is necessary.

13. Some improvement in the meeting between the agency and the Special Projects panel is required.

14. Individual agencies feel that United Way should be accountable to the community for the use of its Special Projects grants.

15. Individual agencies feel that United Way should supervise the agency use of Special Project funds.

16. Agencies feel somewhat accountable to the community at large.

17. Agencies feel directly accountable to United Way.

18. The authority of United Way to question program effectiveness is accepted by the agencies.

19. The majority of agencies feel that United Way and agencies jointly should be responsible for developing a standardized model to evaluate program effectiveness.

20. A standardized model for evaluating program
effectiveness is seen as being helpful.

21. The majority of agencies feel that a standardized model of evaluation would assist United Way to ensure that Special Projects meet their stated objectives.

22. There is some hesitation to the degree that Special Projects help to meet emerging needs in the community.

23. There is some hesitation to the degree that obtaining Special Projects should guarantee United Way membership in the future.

24. There is general agreement that functional budgeting is necessary for Special Projects.

25. The majority of agencies feel that the standards for Special Projects are not too low.

Implications

The findings clearly indicate that the responding agencies are satisfied with the Special Projects process as it presently exists. However, there is a willingness to improve the present methods utilized in the areas of program evaluation and panel presentations.

The function of program evaluation, as discussed in Chapter III, is to measure program results against objectives. Program evaluation is becoming more accepted by the general public and this is evident by the respondents' desire for a standardized model of program evaluation. The researcher
speculates that one reason for this might be that with new and innovative projects there is a need to become more sophisticated and to examine the results against the stated objectives. The implication is that if agencies would like to obtain funding on a permanent basis, they must be able to prove program effectiveness and efficiency.

It is generally agreed that social work has reached the 'age of accountability'. Reference to Alfred Kadushin and Scott Briar's discussion on accountability in Chapter III will assist in the clarification of this concept. The data indicated that the respondents think that they should be held accountable by United Way for the operation of their Special Projects. They also see accountability to the community at large as being important but not quite as important as accountability to United Way. It appears that respondents feel that United Way should take responsibility and supervise new and innovative projects. It can be concluded from this that Special Projects require consultation from United Way. The Special Project recipients view themselves as projects of United Way. The respondents also think that United Way should be accountable to the community at large for its Special Projects.

Although the respondents saw the Special Projects process as an objective one, they did feel that there was room for improvement in areas such as the panel meetings and the application forms. Decision-making processes is a
difficult concept to grasp. Ray Johns and Alexis and Wilson support this in their discussion of decision-making (Chapter III).

The entire area of decision-making is a sensitive one. This is understandable, to a degree, for when human behaviour is involved the process cannot be totally objective. As a result, there is no one acceptable universal model for decision-making. As the researcher stated earlier in the discussion regarding decision-making, the factors influencing the process are relevant for decision-making bodies.

The implications of the findings are specifically related to both the social work profession and United Way. These implications are discussed as follows:

Social Work Profession

It is evident from the findings and the implications that there is a need for the social work profession to be trained in the area of program evaluation and decision-making processes. Public accountability for services rendered and funds expended is a responsibility of both public and voluntary agencies. One method of accountability is through the use of program evaluation. It is only when social workers themselves become comfortable in applying and utilizing the techniques for evaluating program effectiveness and efficiency that the general public will view this as an acceptable form of accountability.
Social work educators have a responsibility to instruct students in both the areas of program evaluation and decision-making processes. Once educated in these areas, the students on becoming professionals will be able to provide the community with the administrative skills that are becoming increasingly necessary for the accountability of social service programs.

United Way

The United Way, as a funding source, must be extremely sensitive to the needs of Special Project recipients. The respondents indicated that they needed supervision and also would prefer to have more consultation. It is evident that in desiring program evaluation, Special Project recipients are asking United Way for specific help and direction. They are also asking to participate in the development of a model for program evaluation. In working together with the agencies, United Way will create a more positive view of the Special Projects process and also develop and implement a model for evaluating Special Projects. The evaluation procedure can then become an integral part of the Special Projects process.

Limitations

It is recognized by the researcher that there are certain limitations to this study. They are seen as follows:
1. The funding of new and innovative projects on a short term basis provided limitations for the research project. As a result, some agencies were no longer in existence and the researcher was unable to trace persons who had been involved in the Special Projects process.

2. The validity of the questionnaire may have been affected by the degree of completeness of the responses. Although the researcher had guaranteed respondents' anonymity some respondents may have hesitated about being completely frank lest United Way be provided with the specific results.

3. The questionnaire was developed with the intent of finding out the respondents' view of the United Way process. The questionnaire could have been expanded to include more detailed information on program evaluation and decision-making processes. However, it was felt that new projects would not be too familiar with the techniques involved. The analysis of the data was, as a result, an analysis of the responses presented.

4. The study was limited to the United Way of Windsor-Essex County. Generalizations made to other populations may not prove to be valid.

5. No attempt was made to study the functional budgeting process as it was felt that the majority of Special Project recipients would be unfamiliar with the detailed process.
Recommendations

Based on the foregoing discussion, the researcher would like to make some specific recommendations for further research. Also included in this section are recommendations to United Way.

Research

It would be of benefit to study "emerging needs" in the community of Windsor-Essex County. Such a study would have to be exploratory in nature in order to identify those emerging needs within this community.

Such a project, if undertaken, would have implications for the Special Projects of United Way and also provide them with information regarding the specific needs of this community.

United Way

The respondents, although they saw the Special Projects process as an objective one, felt that there was some room for improvement. The literature pointed out there is no universally acceptable model for decision-making, however, there is pertinent information available on the factors that influence decision-making. The researcher would like to recommend that United Way provide ongoing training sessions for its volunteers with special consideration being given to those factors which influence decision-
making. This would provide an opportunity for volunteers to become aware of their biases and at the same time help to make the process more objective.

The respondents felt that there was a need for a standardized model of evaluation. They also specified that agencies and United Way jointly should develop such a model. The researcher suggests that a committee be established to develop such a model. The committee should include representatives from Special Projects, Special Projects Committee members, United Way staff and the community.
APPENDIX A
School of Social Work,
University of Windsor,
Windsor, Ontario
N9B 3P4

21 June 1979

I am a graduate student of the School of Social Work, University of Windsor. During the past academic year, I completed an administrative placement at United Way (Windsor-Essex County), under the supervision of the Executive Director, Gary McCarthy.

With the assistance of Gary McCarthy and the approval of the faculty, I have planned an evaluation of the Special Projects Committee process as the subject for my thesis in partial fulfillment for the M.S.W. degree. The thesis is being carried out under the guidance of a committee, the chairman and members are listed at the close of this letter.

A questionnaire has been developed to collect information on the various aspects of the Special Projects process. The questionnaire is designed for the response of the executive director or board members of each agency or group. Your assistance and cooperation in this matter will be appreciated.

All information contained in this questionnaire will be held as confidential by myself, with the exception of question #37 from which quotations may be used in the context of the study.

Please return the completed questionnaire in the enclosed self-addressed envelope by July 5, 1979.

Thank you.

Sincerely,

June Cheeseman (Ms.)

Thesis Committee:

Chairman: Dr. John Barnes, School of Social Work, University of Windsor
Members:

Mr. Valentin J. Cruz, School of Social Work, University of Windsor

Dr. Helen Milton, Department of Religious Studies, University of Windsor

Mr. Gary McCarthy, Executive Director, United Way, Windsor-Essex County
APPENDIX B
1. How long has your agency or group been in existence? Please check one.

1) Less than 1 year
2) 1 to less than 3 years
3) 3 to less than 5 years
4) 5 to less than 7 years
5) 7 to less than 9 years
6) 9 to less than 11 years
7) 11 to less than 13 years
8) 13 to less than 15 years
9) 15 to 20 years
10) Over 20 years

2. a) Is your agency or group (please check one):

1) a member agency of United Way
2) not a member agency of United Way

b) If yes, was your agency or group (please check one):

1) a member agency of United Way prior to receiving a special project grant
2) a member agency of United Way since receiving a special project grant

3. If your agency or group is a member agency of United Way, how long has it been a member? Please check one.

1) less than 1 year
2) 1 to less than 3 years
3) 3 to less than 5 years
4) 5 to less than 7 years
5) 7 to less than 9 years
6) 9 to less than 11 years
7) 11 to less than 13 years
8) 13 to less than 15 years
9) 15 to 20 years
10) Over 20 years

4. a) Has your agency or group applied for United Way membership? Please check one.

Yes  No

b) If yes, indicate the number of times an application for membership was made by your agency or group. Please circle one.

0 1 2 3 4 5 6 7 8 9 10 11+
5. a) Indicate the number of special project grants your agency or group has applied for. Please circle one.

0  1  2  3  4  5  6  7  8  9  10  11+

b) Indicate the number of special project grants your agency or group has received. Please circle one.

0  1  2  3  4  5  6  7  8  9  10  11+

6. In your last year of operation, what per cent of your total budget came from the various funding bodies? Please fill in funding source and per cent of your budget.

1) United Way  
2) Government grant  
3) Fee for service  
4) Productive enterprises  
5) Investment income  
6) Other (specify) %

7. Was your special project entirely financially dependent on receiving funding from United Way? Please check one.

Yes  No

8. Was your application for special projects (please check one):

1) the only service provided by your agency or group  
2) a new service  
3) part of the existing services provided by your agency or group

9. a) Did your project receive sources of funding other than United Way? Please answer for appropriate special project applications.

1) application 1  Yes  No  
2) application 2  Yes  No  
3) application 3  Yes  No  
4) application 4  Yes  No  
5) application 5  Yes  No
b) If so, what source(s)? Please list for each application.

1) application 1
   1) 
   2) 
   3) 

2) application 2
   1) 
   2) 
   3) 

3) application 3
   1) 
   2) 
   3) 

4) application 4
   1) 
   2) 
   3) 

5) application 5
   1) 
   2) 
   3) 

10. In your experience, what appears to be the intent of United Way in funding special projects? Please rate in order of importance on a scale from 1 to 5 (5 being high and 1 low).

1) to fund new and innovative projects
2) to meet emerging needs
3) as a one time funding
4) as a means to secure membership in United Way
5) to fund risk programs
6) other

11. Do you view the special projects process of allocating funds for new and innovative projects as an objective one? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure
12. a) Regarding the special project your agency or group has last applied for, indicate the approximate number of times you consulted with a United Way staff about the application in that year. Please circle one.

0  1  2  3  4  5  6  7  8  9  10  11+

b) If your agency or group applied more than once, did you consult with United Way staff more or less the last time.

More ___  Less ___

13. If your agency or group did consult with United Way, how helpful was that consultation? Please check one.

5) a great deal 
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

14. a) After the decision was made regarding your special project grant, was any additional consultation provided by United Way to your agency or group? Please check one.

5) a great deal 
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

b) If you received additional consultation from United Way, did you find it helpful? Please check one.

5) a great deal 
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure
15. Were the reasons for not receiving funding from special projects made known to your group? Please check one.

Yes ____  No ____  N/A ____

16. In your assessment of the situation, indicate why you believe your project did not receive a grant from special projects. Please check appropriate ones.

1) inadequate documentation of need
2) not innovative
3) duplication of service
4) no volunteer component
5) inadequate organizational capability
6) lack of clarity re goals and objectives
7) inadequate fiscal controls
8) program too risky
9) not new
10) availability of alternate funding
11) Bias
12) other (specify)

17. Special project panels are composed of volunteers; in your experience what degree of expertise do these members contribute to the special projects process. Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

18. What kind of expertise do you think panel members should have? Please rate in order of importance on a scale from 1 to 5 (5 being high and 1 low).

1) some knowledge of budgeting
2) knowledge of social services
3) knowledge of emerging needs in the community
4) knowledge regarding your particular project
5) some comprehension of organizational functioning
6) other (specify)
19. In your experience what degree of expertise do United Way staff persons contribute to the special projects process? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

20. What kind of expertise do you think United Way staff persons should have? Please rate in order of importance on a scale from 1 to 5 (5 being high and 1 low).

1) some knowledge of budgeting
2) knowledge of social services
3) knowledge of emerging needs in the community
4) knowledge regarding your particular project
5) some comprehension of organizational functioning
6) other (specify)

21. Special projects is charged with the responsibility for disbursing funds to new and innovative projects and programs. In your opinion, to what degree is this accomplished through the special projects process? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

22. In your opinion, are special projects panel members provided with enough information on the application forms to accomplish the objective of disbursing funds to new and innovative projects and programs? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure
23. In your opinion, to what extent did the opportunity to discuss your application with the special projects panel add to the process? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

24. In your opinion, how adequately did your agency or group document the need to which your special project was addressing itself? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

25. In your opinion, once funded, should United Way be held accountable to the community for the use of its special project grants? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

26. In your opinion, should United Way supervise the agency or group use of special project funds? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

27. In your opinion, how much responsibility should agencies or groups take in accounting to the community for the use of special project funds? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure
28. In your opinion, how much responsibility should agencies or groups take in accounting to United Way for the use of special project funds? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

29. In reality, how much authority does United Way have to question your special project's effectiveness? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

30. In your opinion, who should be responsible for developing a model that could be used to evaluate the effectiveness and efficiency of the special project programs? Please check one.

1) United Way
2) United Way and agencies jointly
3) Academic institution
4) Social Work profession
5) other (specify)

31. In your opinion, would an evaluation of your special project be helpful to your agency or group? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

32. In your opinion, would an evaluation model, if developed and used, provide United Way with a means to ensure that special projects are meeting their objectives? Please check one.
33. In your opinion, does special projects help agencies or groups to meet emerging needs in the community? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

34. In your opinion, should obtaining special projects guarantee United Way membership in the future? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

35. In your opinion, how necessary do you think it is to do functional budgeting for a special project? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure

36. In your opinion, do you think the standards for special projects are too low? Please check one.

5) a great deal
4) fairly much
3) to some degree
2) comparatively little
1) not at all
9) not sure
37. In your opinion, are there ways not addressed in this questionnaire, for improving the special projects process or any phase of it?

38. Any comments you wish to make, please feel free to do so at this time.
School of Social Work  
University of Windsor  
Windsor, Ontario  
N9B 3P4  

15 July 1979

Re: Special Projects Questionnaire

This letter will serve as a reminder of the questionnaire mailed to you June 21, 1979.

I hope the bulk of the questionnaire is not too intimidating, in reality it takes 10-15 minutes to complete.

Your prompt co-operation in completing and returning it in the self-addressed envelope sent to you previously will be appreciated. If you have already done so, thank you for your assistance.

Sincerely,

June Cheeseman
SPECIAL PROJECT APPLICANTS 1972 - 1979

Ambassador Youth Services
Apartment Living for Physically Handicapped Adults
Association for Children with Learning Disabilities
Association for Development of Human Potential
Big Sisters
Boy Scouts
CARED
Canadian Hearing Society
Canadian Schizophrenia Foundation
Celia Spruce Association
Child's Place
Children's Aid Society
Children's Achievement Centre
Citizens Advocacy
Coalition for Development Committee of 3
Community Information Services
Community Law Program
Crisis Centre
Crossroads
Educated Childbirth Organization
Epilepsy Association
Essex County Diversion Program
Essex County Humane Society
Essex District Community Services
Essex Home Care
Essex Retarded Children Foundation Homes
Fountainbleu Association
Handi-Transit
Hiatus House
House of Sophrosene
Jewish Community Centre
Legal Assistance of Windsor
Light of Service
Mental Health
Multi-Cultural Centre
Multiple Sclerosis
New Beginnings
Nutrition Education Centre
Ontario Anti Poverty Association
Ontario Epilepsy Association
Open Door Social Centre
Open Door - Belle River
Parents Anonymous
Positive Peer Culture
Poverty Crises Centre
Pre School Screening
Prevocation Assessment
Reaching Out
Regional Children's Centre
Research Project
Rest and Lodging Home Committee
Reyes Syndrome
Riding for the Handicapped
Riverview Hospital Outreach
St. Leonard's Society
Salvation Army/Parent Project
School of Social Work
Social Rehabilitation Centre
Students to Oppose Poverty
Senior Citizens Centre
Service d'Accueil
Sexual Assault Centre
Support Services for the Windsor Police
Tel-A-Friend
The Inn
Turning Point
Union Counselling
Volunteer Service Bureau
Wednesday Morning Information
Wheel Coachline
Windsor Association for the Mentally Retarded
Windsor Home Service
Windsor and Essex Child Abuse and Neglect Association
Women's Place
Work Centre for Independent Handicapped Adults
YW Handicapped Club
YM - YWCA
UNITED WAY OF WINDSOR-ESSEX COUNTY
1979 SPECIAL PROJECTS APPLICATION FORM

<table>
<thead>
<tr>
<th>Name of Agency/Project</th>
<th>Address</th>
<th>Telephone No.</th>
<th>Contact Person</th>
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<table>
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<th>Charitable Registration Number</th>
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<th>Occupation</th>
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**Financial Summary**

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**Staff Complement**

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**Proposed Starting Date** __________

**Proposed Termination Date** __________

(Append a copy of constitution and by-laws).
### Staff

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**Fringe Benefits**

List fringe benefits for special project paid staff and percentage contribution by agency (e.g. OHIP - 100% agency funded).

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---
### 1979 PROGRAM STATISTICS

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### FAMILY INCOME

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<tr>
<td>Employment</td>
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<td>Employment Below Poverty</td>
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### AGES OF PERSONS SERVED

<table>
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<th>Age Group</th>
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<tbody>
<tr>
<td>Pre-School (0 - 4)</td>
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<tr>
<td>School (5 - 13)</td>
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<tr>
<td>Adolescent (13 - 19)</td>
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<tr>
<td>Adult (20 - 64)</td>
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<tr>
<td>Senior (65+)</td>
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### AREAS OF PERSONS SERVED

**WINDSOR**

1. Central
2. Devon
3. East Riverside
4. East Windsor
5. Malcom
6. Glipway
7. Leamington
8. Roseland
9. Sandwich
10. Sandwich East
11. South Cameron
12. South Central
13. South Pelletto
14. South Walkerville
15. South Windsor
16. University
17. Walker Farm
18. Walkerville
19. West Riverside
20. Total Windsor

**ESSEX COUNTY**

<table>
<thead>
<tr>
<th>Town</th>
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<tbody>
<tr>
<td>Amherstburg</td>
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<tr>
<td>Belle River</td>
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<tr>
<td>Essex</td>
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<td>Harrow</td>
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<td>Kingsville</td>
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<tr>
<td>LaSalle</td>
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<td>St. Clair Beach</td>
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<td>Rural</td>
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<tr>
<td>Total Essex County</td>
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</table>

### Units of Service

Indicate the total number of units of service for each program. The unit of Service Delivery is listed on Page 7 of "Functional Budgeting for Canadian Voluntary Organizations".

| Units of Service |         |         |          |          |
Indicate all the sources and potential sources of income, the amounts and the status of your request to each.

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Amount</th>
<th>Status</th>
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If your special project is successful and there is demonstrated a continuing need, how will the project be continued and funded after United Way special project funding is terminated.

Any additional comments about your special project.
<table>
<thead>
<tr>
<th>INCOME</th>
<th>TOTAL</th>
<th>Admin'sth</th>
<th>PGM...</th>
<th>PGM...</th>
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<tr>
<td>210 Fees from Clients</td>
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<td>270 Fees from Government</td>
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<tr>
<td>300 Productive Enterprises</td>
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<tr>
<td>400 Government Grants</td>
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<td>900 Other Receipts</td>
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<td>1010 United Way Allocation</td>
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<td>1090 Proration of Admin. Income</td>
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<td>1099 Total Income</td>
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<table>
<thead>
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<th>EXPENSES</th>
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<tbody>
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<td>1100 Salaries</td>
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<td>1200 Fringe Benefits</td>
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<td>1310 Rent</td>
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<tr>
<td>1320 Mortgage Payments</td>
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<tr>
<td>1330 Other R&amp;D, Corp., etc.</td>
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<td>1410 Office Supplies</td>
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<td>1450 Other Office Expenses</td>
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<td>1500 Recruitment &amp; Education</td>
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<td>1600 Promotion &amp; Publicity</td>
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<td>1700 Purchased Services</td>
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<td>3100 Transportation</td>
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<td>3300 Health Services</td>
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<td>3400 Food Services</td>
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<td>3500 Clothing &amp; Personal Needs</td>
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<td>3600 Financial Assistance</td>
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<td>3700 Recreation &amp; Education</td>
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<td>6999 Program Surplus/Deficit</td>
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<td>Cost per unit of Service</td>
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</table>
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VITA ACUTORIS

Ms. Cheeseman was born in Trois Rivieres, Quebec in 1946 and received her primary education there. She received her secondary education in Toronto.

In 1976 she graduated from the University of Windsor, Ontario, with her B.S.W. degree. Following her graduation she was employed as Social Worker at Participation Industries, a project of the Cerebral Palsy Association, for two years.

During the past academic year, 1978-1979, she was enrolled as an administrative student in the M.S.W. program at the University of Windsor.

She will graduate and receive her M.S.W. degree in the September 1979 convocation.