

APPENDIX B:

CDD FUNDING PROCESS STUDY

Best Practices in Local Government Funding Processes

Written by the Center on Wisconsin Strategy
and Submitted by FCI to the
City of Madison, Community Development Division

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I. BEST PRACTICES IN LOCAL GOVERNMENT FUNDING PROCESSES

Executive Summary

The purpose of this document is to present emerging themes and best practices derived from a three month inquiry into community services funding models in U.S. cities and counties. These themes have arisen from an analysis of existing documents and lengthy conversations with community/human services departments from eight municipalities identified and chosen in conjunction with Forward Community Investments. The communities interviewed were chosen based on our experience and expertise with cities around the country, preliminary conversations with city leaders to determine processes and success, and a review of contemporary literature on community services funding. The five communities interviewed and studied at length were chosen because of the variety of funding processes they use, and the degree to which their experience exemplified the interests of the City of Madison.

The communities chosen for in-depth study were Tallahassee (FL), Multnomah County (OR), Chapel Hill (NC), Columbus (OH), and Chattanooga (TN). These five cities are geographically diverse and range in population size from 59,000 to 822,000. While most of them have a comparable community services budget to Madison, these range from \$330,000.00 to \$13 million. Despite their differences, we found that most cities face similar challenges in community services funding strategies, and there are many commonalities in the process of funding. In general, municipalities and outside agencies alike benefit from: a clear and transparent application process that offers a wealth of information and documentation electronically; a mandatory orientation for funded organizations that informs them about the RFP and process; an application and program review process that is overseen by a body seen as impartial and fair; and clear and consistent reporting mechanisms to gauge accomplishments. We delve into how our identified cities handle each of these areas in this report.

Background

Local governments provide a variety of services that can be described as human or community services, including those related to public health, education, providing a social safety net, and more¹. Generally governments contract with nonprofit organizations to do so. In the U.S., community services funding to outside agencies is most typically administered at the county level. Because Madison is in the minority and currently funds at the city level in addition to the funding Dane County provides, we tried to focus on examples of cities funding outside agencies, which narrowed our field of examples, but gave us more directly relevant case studies.

Cities that choose to fund community development agencies are facing some fundamental challenges. First, there is a trend of declining federal funding for local programs. Not surprisingly, there is also an ever increasing need for services coupled with an ever increasing cost of service delivery. The population, density, particular needs, and demographics of cities are changing, and service delivery and program models need to respond to these changes.

To ensure quality services to their communities, governing bodies and their agencies are responsible for providing a transparent, understandable, and equitable process to select the most effective programs and distribute funds to them. Governments must ensure that they are delivering the most services to those who most need them, while being good stewards of taxpayer money by ensuring that outside agencies are delivering services effectively and responsibly.

When this process is designed or administered poorly, the result is a waste of taxpayer and city money, distrust and frustration on the part of city and nonprofit staff, and poor services available to the communities that need them the most. In this report, we want to provide some insight into the common problems that cities like Madison are facing, ways in which some cities have made progress, and other examples from which Madison can learn valuable lessons as it considers its own process. We hope that providing a look at the best of what's out there will inspire readers of this report to think about the many possibilities and opportunities available to them.

The City of Madison has expressed interest in advancing towards a more equitable and transparent process that keeps agencies accountable and achieves better outcomes. The city has asked for a review of current processes and in-depth exploration of three to five good and relevant models of local government funding processes that illuminates best practices and lessons learned from existing models.

¹ For consistency, we tend to use the term community services throughout the report unless a particular local government uses human services as the descriptor for their work.

We set out to identify the following about each process:

- The outline of the process
- The key players and decision makers in the process
- The funding cycle
- What criteria used in making funding decisions
- How were those criteria developed, and how often they change
- How equity is included, if at all
- How the community is engaged throughout the process
- How grassroots/smaller nonprofits interact with the process, if at all
- How the process is coordinated with private philanthropy, if at all
- Any sample RFPs, forms, etc., that are available
- When this process was developed, and how long it took to develop

We recognize that Madison's Community Development Division provides funding to both Community (Human) Services and to Community Development via CDBG and other related funds. This report focuses primarily on community services programs, but does address how cities combine their own funds with CDBG. Despite this focus, we believe that a subset of the practices described here are relevant to any city funding process, including CDBG disbursement. Issues of access, equity and transparency in the process – identified here – can be used to guide city contracting at all levels.

Methodology

We began with outreach to our network of mayors and city staff around the country and a review of contemporary research to identify cities that might be relevant to this topic. Initially we identified approximately ten cities or counties, and presented that list to Forward Community Investments (FCI) along with general information about their process, goals, and program administration. Working with FCI, we narrowed our scope to six cities that seemed most relevant, and began calling city staff in those cities to discuss their processes. At least one of those cities never responded to our information requests. Another we interviewed has a process that is not very comparable to Madison's, and so was dropped from our priority list. Another had a similar program in the past, but currently has no program. We interviewed them, but believe the lack of current documents and practices made them a less interesting candidate for this study. Another city was not identified as a top interest, but we interviewed them because we have a good relationship with city staff and their process seemed reasonably comparable to Madison's. Because of this evolving selection process, you will occasionally see references to practices in cities not identified as top examples, such as Grand Rapids MI, Burlington VT, and Cambridge MA. We have included their experiences where relevant even though they were not selected as top models for this study. We also note here that Multnomah County is quite unlike the other local governments interviewed in its size and focus and has been omitted in some of these sections. We reference Multnomah County only in sections where their experience is relevant to the process in Madison or provides good ideas that we can learn from.

In each city, we spoke with at least one person familiar with the human resources funding process during an in-depth interview lasting anywhere from 30 to 90 minutes and had ongoing email correspondence with them and others in their department. In most cases, we received extensive documents from their process, including RFP's, needs assessments, nonprofit assessment forms, mid-year nonprofit reporting forms, etc. These documents have been supplied as a supplement to this report. In cases where particular documents are cited in this report, they are noted, and in most cases linked electronically. Where online sources were not available, the source is cited in the text and refers to the file name. Based on these interviews, documents, and our additional research, we have written case studies on five cities, which are included in the appendix.

In the course of our research, we identified six basic steps common to competitive community services funding processes. Each city studied does some variation of these steps, to different degrees of success.

1. Identifying funding priorities

This refers to the process by which communities identify the critical needs within their community and set priorities that will guide what gets funded. There are three basic ways that funding priorities/outcome areas are chosen. The first is by conducting a needs assessment. This is typically an extensive and expensive process, but is generally regarded as a good way to arrive at needs areas because it is essentially an independent assessment of community needs by an outside party (i.e. not the city), grounded in community input and information. The city of Cambridge (MA) is using a needs assessment to guide its process. Their assessment cost \$15,000.00, though the city is able to offset some of the cost by partnering with other entities. Chapel Hill's priorities were determined by a needs assessment conducted by graduate students at the University of North Carolina. This removed the financial barrier for the city and provided a real-world project for students.

Tallahassee used a needs assessment from many years ago to set funding priorities and revisit those priorities when a new needs assessment is conducted, though they have remained largely unchanged over time. Their last assessment was conducted in 2010 and they are considering having another completed in 2017. They currently have ten main funding priorities and allocate percentage of available funds to each area based on a mathematical formula. Between needs assessments the city uses routine city and county reports to inform any updates to the priorities.

We found that many other cities often use routine reports, as referenced above, to decide on funding priorities. Many cities we spoke with – including Burlington, Denver, Tacoma, and Grand Rapids – decided on outcome areas after accumulating data from a variety of other sources like surveys, focus groups, and other existing reports done in the city. Many of these cities noted that there are annual reporting requirements for CDBG and HUD funds that can provide most of the information they think they need to update funding priorities.

Finally, in many instances the priority areas reflect the priorities of the Mayor or city council. This is the case in places like Chattanooga, where the city's priorities are an exact replication of the priorities Mayor Burke announced in his campaign. For most of the human resources staff COWS spoke with, the funding priority areas were fairly self-evident, whether they spent a large sum of money determining them or not. However, we note that where needs assessments led to robust community and stakeholder engagement, there seemed to be better relationships between the government, agencies, and the public.

Multnomah County has been honing its process for decades relying on a combination of these methods. The County and the City of Portland human services funding is allocated through their Schools Uniting Neighborhoods, or SUN, Service System . The SUN Service System uses school-based (on school sites) and school-linked (off school sites) services to offer assistance to children and their families. The county does have outcomes areas, but uses a very different process to direct funding amounts. The SUN system has historically separated its funding by region; this year they have decided to split their funds into two separate categories. In this process, 40 percent of the total funding pool will be allocated on a geographic basis; the remaining 60 percent will go to programming for one of six “culturally specific populations.” This grew out of an ongoing conversation in the county about population trends and needs, and specifically hinged on a finding from a county analysis showing that 67 percent of children ages zero to six are children of color and living in poverty.

For each, the county convened a working group to decide funding allocation priorities, and based them primarily on poverty. For regional services, an advisory group met and made recommendations regarding the allocation of resources, including the recommendation to adjust region sizes to be more consistently sized, and to “allocate resources based on both poverty and race/ethnicity, using 2013-2014 Oregon Department of Education Free and Reduced-Price Lunch data.”

For Culturally Specific Programming, the working group noted that, “specific allocation amounts for each culturally specific population are based on ... the percentage of children age 0-6 living in poverty ...who are from a culturally specific population.” Figure 1 shows these percentages.

Figure 1: Multnomah County OR’s allocation of human service funding by region and population.

Allocation Percent per Region		Allocation for Culturally Specific Populations	
Region	Allocation Percent	Culturally Specific Population	Resource Allocation
Region 1	18.8%	Latino	45.7%
Region 2	26.8%	African American	22.8%
Region 3	19.9%	Asian-Pacific Islander	14.4%
Region 4	16%	Native American	7.0%
Region 5	18.5%	Slavic	5.2%
		African Immigrant	4.9%

2. Application process and transparency

This step refers to the process by which agencies and the public access and interact with the application process itself. All the cities contacted had moved from a process of legacy funding – essentially funding the same handful of organizations without using an RFP or competitive process – at some time in the last 20 years. Each community established an application process. Ideally, this process is one that organizations feel is easy to access and understand, and which gives them an equal opportunity to access funds as other organizations.

Tallahassee offers a unique and robust example because of their many years of experience with a competitive process and their willingness to revisit and reassess the process each year. While the department makes small changes in response to annual feedback, the basic structure of Tallahassee's competitive program has been in place for 20 years. Tallahassee allows interested outside agencies to sign up ahead of time to receive updates about their Community Human Services Partnership (CHSP) program, like upcoming informational sessions and application due dates. The program is administered through a separate portal on the city's website, and uses one application to apply for funding from the city, county, and United Way. The CHSP Portal is a one stop shop for access to eligibility requirements, due dates, past funding decisions, reporting requirements, and volunteer resources. In addition to documentation, Tallahassee's process requires agencies to give a presentation on their work to city, county and United Way staff to the Citizen Review Team, which scores the presentations and uses the scores as part of their determination process. The CHSP has a set of very specific requirements and parameters for presentations (time, topics addressed, and things to avoid), available in their program manual.

Many resources are dedicated to leveling the playing field for organizations – informational sessions are mandatory, there is an application review period during which city workers and volunteers work with agencies to fix problems and tweak applications, and due dates are hard dates. All deliberations on funding are open to the public, as are the organizations' pitches to the various committees. All documents are available to the public, and there is a process for appeal. Funding requests are assigned to one of nine funding areas, and each funding area is reviewed by a Citizen Review Team (CRT) assigned to that funding area. CRTs make recommendations to CHSP staff, who decide on final funding based on recommendations, legal requirements, and historical performance factors.

Chapel Hill has a similar application process on a smaller scale and budget. They partner with the county and neighboring town of Carrboro, sharing one application while keeping separate funding streams. A number of documents detailing eligibility, requirements, and deadlines are available on their website. There is an orientation process, but it is voluntary. After the application process, a citizen led advisory board makes recommendations to the town manager, who reviews the recommendations and sends them to the town council for a final vote. Our contact in Chapel Hill, program administrator Jackie Thompson, notes that for their funding cycle beginning in 2016 they will be using the same application for CDBG and city funding for the first time. That application was released online in January 2016. These processes will share the same orientation process, but have a separate CDBG Committee to review applications for those funds. Agencies applying for CDBG funding will be required to fill out additional forms to address federal requirements. Because of its interest in this path, and Thompson's eagerness to discuss this issue and learn about other processes, we encourage Madison to review their application description and to contact Jackie Thompson about how the city transitioned to this process.

Columbus is just completing a pilot program of their new funding process. The city identified three broad funding areas and invited initial letters of interest from agencies to weed out proposals that would not fit within those funding areas, then fielded applications from those that did via a 15-person citizen board. A big drawback to this process for both applicants and the city was that they did not have a system in place for electronic submission of documents, and all applications were processed on paper.

Chattanooga differs from all these programs. Having recently adopted an outcomes-based budgeting approach, the city uses the same application for every department, agency, or nonprofit seeking funding from the city. Every funding request must address one of six priority areas identified by the Mayor, and each funding area has a five-member team that decides on funding allocations. Chattanooga also hosts a mandatory informational session for agencies. Application materials are available online, and include a requirement to demonstrate collaboration with city departments who work on similar issues to reduce redundancy in funding allocations and avoid duplication of efforts.

3. Orientation for outside agencies

This refers to the way that local government can best prepare agencies to succeed in the application process and to ensure it receives good and complete applications. Tallahassee holds a mandatory workshop for all outside agencies, requiring at least one staff person from each group attend at least one of three available sessions. In addition to this, there is a several week period between initial submittal and final submittal of applications during which staff offer technical assistance to outside agencies to finalize and standardize applications.

Chapel Hill holds one voluntary orientation to review the RFP and answer questions, and provides their orientation PowerPoint on their web site. The orientation presentation is an introduction to the application requirements, different funding sources and what that means for the organizations, and an opportunity to ask questions of city staff.

Columbus begins their process by requesting a statement of interest from all groups interested in funding, resulting in a pre-screening process that eliminates funding requests outside their three funding priority areas and weeds out incomplete or ineligible applications. The city also holds two voluntary orientation sessions for agencies, though they have not been robustly attended. City staff reports a wide variance in the quality and completeness of applications, and notes that they would be interested in a mandatory orientation in the future.

Chattanooga held a mandatory informational session for agencies last year and will likely continue that practice. Feedback they received from agencies in the 2015 budget cycle was that some agencies put a lot of effort and resources into their application only to be dismissed as irrelevant to the city's outcomes strategy. This year they plan to institute a pre-screening process whereby groups could submit a 200 word summary of their program or project, and only relevant programs/projects would be invited to submit a full application. In addition to this, in this second year of their Budgeting for Outcomes model, they will be inviting an initial offer from organizations who apply and holding a feedback period. This period is designed to not only enhance the strength of the applications, but to learn more about the pool of applicants and find ways that agencies and organizations might collaborate and reduce redundancies in funding. This is part of an intentional and multifaceted effort to encourage collaboration as part of their BFO process.

4. Citizen involvement

This refers not to including citizens in the funding priority identification process, but instead to if and how local governments can involve citizens and volunteers in the decision making process.

Tallahassee recruits a large volunteer pool for the purposes of reviewing applications, conducting site visits to agencies, and making recommendations to the city council. These teams exist for this purpose only and are dissolved each year when funding decisions are made. These Citizen Review Teams (CRT's) and the care with which they treat them appear to be one of the city's biggest assets and allies in human services funding allocation. Administrators here have worked hard in the past to recruit representatives from all different communities and occupations and do so on a continual basis. The city takes care to assign these volunteers such that each team has a range of experience related to the subject they are reviewing. While there are not designated seats on each team, staff try to place someone with legal experience, someone with educational experience, someone from the population served, and someone from the city, the county, and the United Way on each team. They also try to get the demographics of the teams to reflect those of the city. This process involves asking a lot of personal questions about race, background, and occupation during the volunteer screening process, and was added years into their competitive process in response from agency and the community complaints of racial bias in their process.

Despite the fact that it is labor intensive for the city, it continues to recruit and train new volunteers each year (though many volunteers serve multiple years), and to painstakingly assign volunteers to a relevant CRT while avoiding conflicts of interest. Last year they accepted 91 volunteers, assigning between seven and nine volunteers to each of the ten funding areas. These individuals donate an average of 36 hours of their time for this purpose, and volunteers are responsible for serving approximately three days, never in the same week. The city holds mandatory training and orientation sessions for volunteers and has created very specific scorecards and feedback mechanisms for them to use throughout the process, intended to provide agencies with useful and actionable feedback on their programs and application. In addition to grading applications and presentations, members of the CRTs also conduct site visits to funding applicants. While the program has not come without criticism from the nonprofit community, there has really been no complaint about the role and responsibility of CRT members that we could find.

Chapel Hill also engages the community via a seven-member Human Services Advisory Board comprised of citizen volunteers who convene once a week for approximately two months to hear presentations from applicants. Volunteers are required to attend an orientation on the process and their responsibilities. This is a city board that meets once a month throughout the rest of the year to keep the town council informed on human services needs and updates.

Columbus recruits experts in their fields from the general public to form a 15 person grant committee. The 15 volunteers are split into three groups of five, the idea being to divide into groups of similar applications (Columbus uses just three broad funding priority areas). The city makes a good effort to assign persons with knowledge or expertise in a funding topic to a relevant team. Last year each group reviewed approximately 35 applications, and each was asked to come to a first meeting with 10 top picks and five alternate picks. They were able to fund all of their top picks with the budget available. Volunteers used a scoring sheet for rating the applications, but the scores – while part of the decision process – did not correspond directly to what was funded. Because of this, volunteers for this first year had a contentious time, as unfunded agencies unhappy with the outcome filed open records requests to receive documents related to agency selection. Many were upset that their unfunded organization received a higher score than a funded organization, and generally harassed grant committee members about funding decisions. Staff in Columbus acknowledge that the process would have benefited from an assumption of transparency in this process.

Chattanooga has a five-member panel for each of its five priority/outcome areas. Each team is made up of one citizen volunteer, one member of the budget department, one administrative city employee who is not from that area/department requesting funding, one representative of the mayor's office, and one final member that is decided upon at the discretion of the finance department, which houses all contracting issues under their Budgeting for Outcomes process. As noted elsewhere, these teams are used to make budget and funding decisions for both city departmental budgets and outside agency funding. They continue meeting throughout the year to aid collaboration between these groups and track progress, but our contact there said that the format is not comparable to a commission. Because the majority of this team is comprised of city workers, participation in the process is an extension of their normal work.

Multnomah County, like Tallahassee, convenes a review team for the specific goal of making human services funding recommendations. They ask team members to commit approximately 30 hours of volunteer time for this purpose, and recruit volunteers from experts in their fields who are not competing for funding. Proposals are pre-screened by county procurement professionals to ensure that applicants meet minimum requirements for county procurement, and then the applications are passed to review teams, which score proposals on a numerical scale. The organization with the highest score in a category is recommended for funding.

5. Determining winners

This step refers to how a local government ultimately decides what gets funded. In all cases, a review team made up all or in part of citizens reviews and scores applicants in some way, and then passes their recommendations on to a city or town council, which has final authority.

Tallahassee leaves this decision largely in the hands of its Citizen Review Teams, who listen to presentations, look at applications, and scores agencies (refer to the document “2015-2016 Volunteer Assessment Guide”). As extra protection against bias, all seven to nine members of each review team must unanimously approve the recommendations for that team, and those recommendations are passed to the city for consideration. The city says that its administrators generally take these recommendations, though they will also look at legal requirements for funding more closely, along with the organizations’ history of performance.

Chapel Hill’s seven member advisory board made up of citizen volunteers meets for a period of several weeks to hear presentations from agencies and review applications. They make their recommendations to the city manager, who reviews the applications for legal and technical issues, and passes these recommendations on to the town council, which has ultimate say. Similar to Tallahassee, the recommendations are largely followed, and the process was described as pleasant by their Human Services Coordinator, Town Manager, and Mayor.

In Columbus, grant committee members were asked to fill out score sheets for each organization and to use numbers, though the numbers were just to facilitate the process and the groups with the highest number did not necessarily get preference, as decisions were made after group discussion and forwarded to the council.

Chattanooga’s five member review team comprised of a variety of interests reviews all applications both from city agencies and outside agencies. The applications are judged on completeness, relevance to identified outcomes, and the degree to which they show collaboration on common issues and outcome areas. Recommendations are forwarded to the mayor, who assembles a budget for the city council.

6. Measuring Outcomes

As one might expect, a competitive process tends to lead to and benefit from an increased interest in measuring outcomes. Faced with limited resources and ever expanding need, local governments want to know that their money is being used wisely and that their populations are being served responsibly. Despite interest in being more proactive about measuring program outcomes, all the programs we spoke with are largely still measuring outcomes based on persons and populations served. None of the programs has yet solved the problem of directly measuring impact or capacity building, but some are moving in that direction.

Tallahassee measures success based on numbers served, but their addition of site visits adds another layer to their monitoring process. During site visits CRTs score organizations on things like administrative procedures, personnel issues, and their demonstrated capacity to deliver the services they've committed to (Please refer to reference document "Tallahassee Monitoring Document"). Our contact there says that with a citywide poverty rate of 30 percent – and as high as 51 percent in some areas – the need is so high that they've had to design innovative ways to measure capacity beyond numbers in a chart. One other interesting aspect of their outcomes document is that for each priority area, the outcomes are split into "prevention," "intervention," and "support" outcomes. This approach opens the door for a range of different organizations and organizational structures to make a case for funding – whether they work to build community capacity to combat an issue, work to intervene in the lives of people/communities dealing with an issue, or work to rehabilitate persons/communities who have dealt with an issue. Agencies report their progress quarterly, and are subject to at least one site visit per year.

In addition to measuring demographics served, Chapel Hill uses SMART (Specific, Measurable, Achievable, Relevant, Time-bound) guidelines to track outcomes. In their 2016 application, it does appear that they've asked for more demonstrable outcomes than in the past. Groups report their progress twice annually and don't get any money until their first mid-year report, at which time they get at least half their funding if they demonstrate progress toward their goals.

The model in Columbus is just in its first year, so it is difficult to say how they've tracked outcomes or to what degree they've been successful. Groups are required to file quarterly reports. Their self-reporting document, much like their application (refer to the document "2015 Human Services Program Quarterly Activity Report), essentially asks for a narrative description of outcomes, which likely explains our contacts' displeasure with first year outcomes reports. Our contacts reported that responses were erratic and lacked uniformity. Because Columbus did not set clear requirements and criteria for continued funding ahead of time, it appears that they are having trouble justifying terminating contracts or measuring progress against goals in a uniform way.

Chattanooga, TN has taken this focus on outcome measurement one step further by redesigning the city's entire budget in favor of a "Budgeting for Outcomes" model for the city across the board. As noted elsewhere, Mayor Andy Burke outlined five priority areas for the city and all agencies applying for funding by the city – whether public or private – must be accountable to those priority areas and outcomes. While our contact there insists that not all outcomes must be numerical, there does have to be some measurable indicator of progress. On their documents, the city asks for at least three measurements from each agency. For each one they must list the results area targeted, primary desired outcome, description of output measured, and frequency with which it is measured (daily, weekly, monthly, quarterly, etc.). For each, they also ask for historical data from 2013 and 2014, along with 2015 and 2016 targets. This kind of data helps them to simply and quickly see if the data is pointing in the right direction. In addition, the city has hired a new permanent position of "Performance Manager," whose job it is to monitor progress on outcomes identified in proposals.

As for Multnomah County, having just begun a five year funding cycle with a new process, it is impossible to say how successful they've been at measuring outcomes for this particular process, though the SUN program itself has a long history. The county uses ServicePoint (Software for Human Service Organizations) and OPUS reporting to track all its programming measurements. As you can see in "SUN Service Program Model Nov 6 2016," the program lays out very specific targets for every facet of programming; these are in the format of a percentage change, number of persons served, or similar measurement. From that document: "The SUN Service System evaluation plan currently focuses on both process and outcome evaluation not only to clarify how programs are implemented and how services are delivered, but also to capture program-wide and system-wide progress and results. System evaluation typically is conducted by DCHS evaluation staff that rely on and continuously refine established methods to generate valid, reliable and measurable results."

One additional program that we did not feature at length, but is doing something different with outcomes and accountability is the Human Services Contracting program in Tacoma, WA. Like Chattanooga they also call their process an outcome based approach to human services funding. In Tacoma, the city works with agencies being contracted to develop an "Outcome Based Evaluation System to measure the impact and effectiveness of program services." Consequently, payment is "associated with service deliverables, with 60% of the budget equally disbursed over the course of the contract period (5% each month) for operation of the program and the remaining 40% dispersed as each payment point is met." Essentially, the city works with each agency to develop measurable and desirable goals, and then asks them to be directly accountable to those goals to continue receiving funding.

Issues of Interest

The good news: Madison is ahead of many cities on competitive funding for community services

Despite its perceived and identified shortcomings, Madison can be proud that it has had a competitive community services funding process in place for years. During the course of our research, we found that a number of cities are just now beginning to move to a competitive process. For these cities, this involves a difficult shift away from funding “legacy groups,” or groups that have historically received line item funding, and towards some kind of competitive or application-based process. Many cities around the country are undergoing this process now or have at some point over the last 20 years and, as we note, face common challenges in doing so.

In Madison’s case, we understand that there has been frustration about how to encourage equity and access despite the existence of a competitive process. In our research we did not find evidence that other cities are concerned about increasing access to small or non-traditional organizations. We did find that important elements to leveling the playing field in a competitive process include making deadlines, applications elements, and all other facets of the application uniform and non-negotiable. Groups competing for funding want to know that access is fair and that the scoring process is public. This is a move away from allowing organizations to lobby city council members or the mayor for funding and putting those decisions into the hands of an unbiased panel. In one city we spoke with, Burlington (VT), there were a handful of traditionally funded groups that were essentially just written into the city’s budget each cycle without question until a new mayor saw this and is now moving to a competitive process. In the examples we’ve looked at, a competitive process is best accompanied by a refocusing on measurement and outcomes as an objective justification for all parties involved. The cities we spoke with had the prevailing consensus that outcomes matter more than access, and while they were interested in access for smaller groups there was virtually no interest in compromising outcomes or impact to address the issue of access. Many focus on access by contracting with smaller organizations or community groups in a separate process, which we reference below.

Related to this, Madison has expressed an interest in processes where a single application is used for both city funds and CDBG funds. The cities we spoke with that do this to some degree are Tallahassee, Multnomah County, and Grand Rapids (MI). The purpose of this is to streamline the process for both applicants and the city. In addition, the city can be sure that it has its legal bases covered if it adopts the requirements imposed by CDBG funding. The cities that do this have noted that it takes them extra time to match the correct funding stream to the different agencies and programs. In addition, this practice does lead to a higher bar for eligibility for funding – CDBG funds have strict guidelines for legal status, documentation, open meetings, reporting and auditing. This may reduce access for smaller or less established organizations, or just create an extra burden on groups that can meet these requirements, but who find it too cost or time prohibitive to complete the application process. Chapel Hill, which began doing this just this funding cycle, addressed this issue by requiring additional reporting from organizations requesting CDBG or HUD funds rather than adopting CDBG requirements for all funding.

One way to avoid imposing too heavy a burden on these groups is to have a separate pot of money available for smaller groups or emerging needs. The City of Madison currently has a program like this. Denver plans to do this with a “Mini Grants for Race and Justice” and they were conceived from community discussions surrounding race and inequality issues over the past few years. They tentatively plan to start this fund at \$250,000.00. They hope the mini grants will start at just \$100, and can be used by smaller groups to respond to specific community needs or events. The city of Burlington is also doing this, although less formally. In restructuring its program Burlington found itself with an additional pot of money available, and converted this into a “Special Projects & Emerging Needs” program.

Another way to address this access issue is to include a pre-screening process for applicants so that they know if they are eligible and or/likely to be funded prior to completing a full application. As noted in the “Orientation for agencies” section above, Chattanooga, Multnomah County, and Columbus incorporate this idea into their process or plan to this cycle.

The city has also been interested in ways in which cities work with neighboring cities, counties, and United Way. A city-county-United Way partnership has not been uncommon in the cities we’ve spoken with, either now or in the past. It is another way to streamline both services and the application process. Tallahassee is the city that we spoke with that has used this partnership most effectively. Their 20 year partnership has resulted in an almost continuous expansion of funding, annual improvements, and a reduction in service delivery overlap. Our contact there, Patricia Holliday – who oversaw this effort 19 years ago - is more than happy to discuss their experience there, which began with a city-county workshop to share ideas and build consensus. She describes it as a mostly positive relationship and experience, though not without hurdles. Staff longevity has been a key component in their good working relationship, and Holliday notes that frequent turnover could be a big problem for this type of program, as are big egos. She also noted that the United Way was not used to operating in the public sphere as city and county governments are required to in Florida, and that it took them a while to become used to the open meetings and public nature of the process.

Equity, Diversity and Serving Those in Most Need

Madison has also expressed an interest in how racial equity factors into the programming decisions and the funding process, if at all. Very few programs we contacted spoke directly to the issue of equity. In general, the discussion was centered on raising the quality of life for citizens and the city at large. In some cases it extended to building the capacity of the nonprofit community to work with the city to address human services needs and gaps. Several cities cited reports on the economic disparities or poverty rates in their communities as ways they arrived at their funding priorities. For example, Grand Rapids, MI targeted resources by identifying areas where at least 51 percent of the residents were low income. The city stopped its Human Services funding program six years ago due to budget concerns, but is looking at starting it again in some form as the economy rebounds.

Multnomah County is the only local government we spoke with that is specifically addressing racial equity in its funding process. Their commitment to equity and to culturally specific programming is what led us to contact them. Multnomah County moved to this system after studying the issue for decades, and following multiple community and leadership engagement strategies and studies. With the program just now in its pilot year, it is impossible to judge the results, but the model is certainly worth paying attention to. One thing worth noting is that the focus on culturally specific programming does not translate into the funding of smaller, more, diverse organizations. Rather, the county identified six cultural groups that it wished to represent, and gave very large contracts to six organizations to represent those groups. This is indicative of a system that serves a much larger and diverse population than Madison or Dane County.

Issues Related to Process

Is anyone doing nonprofit capacity building?

None of the cities we interviewed are working to directly monitor or build the capacity of local agencies over the long term, though many of their practices – such as increasing the stringency of reporting standards, offering feedback on their applications and presentations, and requiring proof of collaboration between agencies in the community – may contribute to that goal.

One city that does seem to be focusing on capacity building, but which we were not able to interview, is Berkeley. In 2013 they solicited proposals to help with organizational capacity building over a period of two years. Specifically, the RFP noted that, “During the recent funding allocation process, the City found that the youth serving agencies, City staff, and the review panel—the City’s Children, Youth, and Recreation Commission (CYRC), are in need of technical assistance to be more responsive to the 2020 Vision and other City priorities, as they emerge, which includes an improved ability to develop and monitor indicators of program success. The City also found that a third-party evaluation of program quality of current grantees, and technical assistance for grantees on strategies for increasing their evaluation capacity is needed.” As a result of that process, the city has held multiple sessions for agencies “to communicate the improvements to the funding and application process, to provide general feedback on their prior applications, to introduce best practices in grant-making, to obtain feedback on the last cycle’s request for proposals and to present best practices for developing and managing outcome measures.”

The City of San Francisco CA has established an entire program to help build nonprofit capacity – the Citywide Nonprofit Monitoring and Capacity Building Program. Because they fund hundreds of agencies from multiple funding streams and many departments, the city decided to consolidate fiscal and compliance monitoring and to offer training and technical assistance to agencies. All agencies must qualify to do business with the city, but once they do they are eligible not only for contracts, but also for a range of services and assistance. The city website has extensive resources for agencies and offers trainings, webinars, best practices examples, and financing guides.

How do groups get their money?

The cities interviewed do vary considerably in how they distribute their funds, and this has implications for access and capacity as well as accountability. Generally, while withholding funds pending reporting some level of results or progress may increase the accountability of agencies, it may also reduce access for organizations that lack the capacity, capital, or staff to deliver services prior to being reimbursed.

Tallahassee and Chattanooga reimburse organizations monthly or quarterly, depending on the funding source. In Columbus, approved organizations receive 25 percent of their funding up front and then report to the city quarterly and invoice the city for the remainder of their balance.

The Town of Chapel Hill uses a “Performance Contracts” model, whereby agencies get no funding at all until their first mid-year progress report. At that time, the city will issue some portion of funding dependent on the degree to which the organization has performed according to its goals.

Can cities promote collaboration?

From our research, it appears as though cities are beginning to prioritize and give preference to collaboration between agencies and programs. Tallahassee lists one of the benefits of its process as promoting “dialogue on community-wide planning and coordination of human services.” To encourage this, it includes information about “Collaboration Approaches” in its Program Manual and requires information on collaboration attempts in its application process. Chattanooga, in their new focus on Budgeting for Outcomes, encourages collaboration by requiring organizations to demonstrate outreach and collaboration with similar agencies or agencies with similar programming in their application.

Chapel Hill and Columbus also ask about addressing funding gaps and showing awareness of collaboration opportunities in their application. Chapel Hill’s application asks agencies to, “Provide a bulleted list of other agencies, if any, with which your agency coordinates/ collaborates to accomplish or enhance the Projected Results in the Program(s).” Evidence of collaboration is one of many issues taken into consideration in the funding process. Columbus’ Letter of Intent includes an entire page seeking information about collaboration. This includes listing who the organization collaborates with and how they do so (“Networking, Cooperation of Alliance, Coordination or Partnership, Coalition, or Collaborative”). It asks for a description of the collaborative’s history, structure, role of the partners and their scope of work. Specifically discuss what the partners can achieve as a collaborative vs. independently; outline how accountability, performance and resources are shared.” Their full application asks agencies to identify other organizations which overlap with their work and note how their program addresses funding gaps or proposes to work with other organizations.

How does the length of funding cycle factor in?

The cities we interviewed all operated on an annual budget cycle, but varied in the length of potential contracts. From our discussions, there is a general trend towards considering longer contracts in order to both give organizations more time to make an impact, and to simplify the funding process or align it more closely with other budget cycles particular to their city government.

Like Madison, Tallahassee, Chattanooga, and Chapel Hill all fund on an annual cycle. As noted elsewhere, Columbus is moving to a three-year funding process that would offer initial funding for one year with extensions possible up to three years total if the organizations are performing well – though they have not yet established a process that they think is successful in determining performance. Multnomah County funds in a five-year cycle and is focused on providing large contracts to regional and culturally specific providers who are expected to move the needle on significant indicators.

Ultimately, lengthening the contract time is worth examining, depending on the funding priorities and outcome indicators Madison decides upon. While this does give organizations more time to build capacity and programming with reliable funding, it also limits access for other, emerging organizations.

Conclusion & Recommendations

It is clear to us that there is not widespread agreement or even discussion about the efficacy of human services funding. However, there is a growing awareness that in order to achieve better outcomes for their citizens, cities and counties need to be more strategic in their application and delivery processes and need to consider ways for the diversity of their communities to be reflected in their funding allocation process.

Having had a competitive process for many years, a series of in-depth community studies at its disposal, and an obvious interest in robust community involvement in formulating a path forward, Madison has an incredible opportunity to be a leader in driving equity and outcomes with its human services funding. We sincerely hope this report can offer a summary of the challenges in this field as well as the potential for improved service delivery that is possible when local governments, agencies and citizens collaborate to best serve their most vulnerable and to ensure the best return on investment possible for the community itself.

Based on our research, there are a number of specific recommendations and best practices to help guide this transformation. They are listed below, with reference to a particular best practice where relevant.

Be transparent about your funding priorities

- Recruit a diversity of opinions and take your time in formulating priorities.
- However you reach priorities, be very transparent about how they were reached.
- Consider targeting funding by geography, economic need (e.g. poverty rate) or cultural group.

Ensure a level playing field:

- Have clear, non-negotiable deadlines for everything.
- Ensure that documents are accessible online; provide a way for agencies to sign up for updates and a central website for all information. Best practice: Tallahassee's CHSP Portal.
- Have a mandatory and informative nonprofit orientation with multiple dates for attendees. Best practice: Tallahassee.
- Provide a feedback period to correct simple application mistakes. Best practice: Tallahassee and Chattanooga.
- Require agencies to present their proposals to the reviewing body, offer specific parameters for those presentations so that review teams can compare apples to apples, and offer resources and tips to agencies on how to create a successful presentation. Best practice: Tallahassee.

Streamline where it makes sense

- Common applications are helpful, but only if there is agreement among the parties. Take ample time to convene the different interests (i.e., city, county, United Way, etc.) to ensure common goals, understandings, power structures, etc. Best practice: Tallahassee.
- Consider a common application for city funding and CDBG funding, but consider requiring supplemental documents for the later to ensure wider access to funding. Requiring the same eligibility status for all groups may exclude smaller organizations that don't have the time, personnel or documentation to qualify for federal programs. Best practice: Chapel Hill.

- Provide a pre-screening process to ensure that agencies do not waste their resources pursuing funding not applicable to them, and the city does not waste time reviewing and responding to them. Best practice: Chattanooga's 200 word statement of interest.

Work to have diverse citizen input

- Recruit heavily in every community: attend neighborhood meetings, board meetings, etc. and ask difficult questions. Strive to ensure that every community/demographic served is also reflected in the decision making process. Best practice: Tallahassee's Citizen Review Teams.
- Consider shifting from a year-round appointed committee to short term citizen teams to provide citizen input on funding decisions. This reduced time commitment may increase the diversity of your volunteer pool. Best practice: Tallahassee's Citizen Review Teams.

Promote collaboration and reduce overlap

- Make identifying overlap between organizations and programs part of the mandatory application process. Best practice: Chattanooga.
- Make applications or letters of interest available to applicants during a prescreening process so that organizations are more aware of overlap and able to address it in a final application.
- Ensure that review teams are grouped by issue/priority areas so they can judge similar applications together.

Promote the best ideas and programs

- Create clear and consistent reporting methods for outcomes so that cities can judge whether groups are providing the services they promise.
- Develop a system to track measurable outcomes that may not be numerical.

Many of the recommendations above apply equally to the Community Services and Community Development parts of funding and, indeed, to other types of programs and services that the city of Madison funds. Principles of transparency, simplicity, and citizen engagement do not vary according to funding source. However, we do recognize that there are similar best practices that are more specific to community development work. As that was outside of the scope of this report, we recommend conducting a similar study focused specifically on community development and CDBG funding.

The challenges we have identified in this report are common to all cities who want to do successful nonprofit funding in the service of community services work. With these examples, we hope we have provided some insight into how a city might go about confronting and overcoming those challenges and creating innovative approaches that help achieve the outcomes we all want. We are more than happy to connect you with additional resources or to facilitate communications with the cities and staff that we worked with in assembling this report. We are very excited for Madison as it undertakes this process, and sincerely hope this report helps to inform you and the City as you continue to improve the Community Development Funding Process.

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II. ANNEX: CITY CASE STUDIES

1. Tallahassee, FL

“Community Human Services Partnership” (CHSP)

Population: 186,411

Contract/grant cycle: 1 year

CHSP budget: \$4.5 Million (total funding): City (\$1.1M), County (\$1M), United Way (\$2M)

Number of agencies funded 2015: Approximately 70

Award range 2015: \$4,500.00-\$337,000.00

Format: Contract RFP

Funding source

Mix. “The City does this by making available a portion of its Community Development Block grant, general revenue and Change for Change funds while the County utilizes general revenue funds. The United Way allocates funds raised in its annual community-wide campaign to United Way Certified Agencies through this process.” The city has been very helpful in offering us details on their funding sources; please refer to the documents “2015-2016 Grant Summary Funding Sources” and “2015-2016 CHSP Allocations” for a full accounting of funding sources.

Funding priorities

(1) Children’s Services, (2) Community Support Services, (3) Services for Persons with Disabilities, (4) Basic Needs and Emergency Services, (5) Family Support Services, (6) Physical Health Services, (7) Senior Services, and (8) Substance Abuse Services, (9) Youth Recreation & Character Building, and (10) Youth Education Services.

How and who measures outcomes?

RFP lists eight needs categories and eligible outcomes for each; nonprofits provide quarterly and end of year reports that address these in addition to assessing their progress towards their stated goals and demographics served.

Any partners they work closely with

Consolidated between City, County and United Way.

Description of process/timeline:

- A public notification process. (December of previous year)
- A mandatory workshop for interested private, not-for-profit organizations. (January)
- Use of a standardized application, which includes legal, organizational, financial, managerial, programmatic, and program evaluation information.
- Technical assistance is available after the RFP workshop for a period of several weeks.

- Submission of agency applications by a designated time frame. (Late February)
- A technical review of all applications by staff to confirm eligibility and completeness. (March)
- Recruitment and training of volunteers. (March)
- The organization of volunteers into Citizens Review Teams (CRTs). (Feb/March)
- Each team reviews the applications, listens to agency presentations, completes agency/programmatic assessments, recommends priorities, and makes initial funding recommendations. (April/May)
- CHSP staff determines funding allocations based on legal, procedural and historical factors. (June/July)
- Agency award letters, which include direct feedback from CRTs, are forwarded to the executive director/CEO and the board president. (June/July)
- An appeals process is made available to an agency contesting the CRT recommendation(s). (August/September)
- Recommendations are submitted to the City Commission, the Leon County Commission and the United Way Board of Directors for final approval. (August/September)
- Contracts and memorandum of agreements are executed.
(Fiscal year is October 1 - September 30.)

Staff longevity and commitment is key: While many of the staff involved were new at the time of the program's initial implementation, they have since benefited from low staff turnover. The administrators for each of these three entities work long hours and are very public figures – Patricia Holliday adheres to a strict open door policy and talks to people about these issues every day. After 20 years heading the program for the city, Holliday still oversees site visits and agency advising on a daily basis.

Diversity and representation of served communities on the CRT is key: Staff has done extensive recruitment and outreach to get to this point, and are adamant that CRT members know the communities served by the agencies they are assessing. They survey agencies and volunteers annually and make adjustments on an ongoing basis.

Mandatory trainings, transparent and enforced rules and procedures, and strict deadlines are key: Mandatory trainings/workshops for interested nonprofits and CRT members' (plus training for CRT members) means that everyone starts with an equal knowledge of expectations. This in turn sets the precedent for strictly enforced rules of submittal, etc. – groups cannot complain about lack of knowledge/access to the application.

All this focus on accountability, standard eligibility, and bringing groups up to this level does mean that smaller groups may lack access: These programs have some of the strictest eligibility criteria of all the cities COWS spoke with, and Tallahassee manager Patricia Holliday was quick to note that the high need for services calls for a focus on capacity and accountability. "You have to keep in your mind that the point is to improve quality of services, to improve quality of life for the community, so you can't get caught up in the organization side to where it clouds that objective," Holliday said. In short, just because a group wants to service its community doesn't mean it has the capacity to do so; the high amount of need dictates that money needs to go to the groups that can demonstrate the most impact.

2. Multnomah County, OR

“Schools Uniting Neighborhoods” (SUN)

Population: 766,135

Contract/grant cycle: 5 years,
“contingent upon contractor performance and available funding”

SUN Competitive funding budget: \$13.2 Million

Number of agencies funded 2015: 12, plus some minimal sub-granting

Award range 2015: \$327,000.00-\$2,800,000.00

Format: Contract via RFP

Funding source

Combination of local, state and federal

Funding priorities

(1) Children Ready to Enter School, (2) Academic Success, (3) Healthy Kids and Families, (4) Prosperity, and (5) Desirable Places to Live.

How and who measures outcomes?

New process includes a pre-screening of applicants to determine their capacity; their newly released Program Model includes a number of specific outcomes and targets for each priority funding area they are funded for.

Any partners they work closely with

City, United Way

Description of process/timeline

This is a relatively new process, so we may need to wait on some of these details. Their new RFP was just released in November 2015. Generally thus far, the process began with a working group/task force that met for 3-6 months to establish their “Theory of Change” with an equity focus in 2013. This was a group made up of directors from across the county’s field including human services, health, and community justice and led by the Office of Diversity and Equity. Following this, an allocation committee comprised of nonprofit leaders who don’t provide direct services but whom have deep relationships with communities of color, in addition to foundation representatives and a school superintendent, gathered to determine the percentage of the money that should go to culturally specific community organizations.

This resulting model is an ideological combination of their existing Schools Uniting Neighborhoods (SUN) Services program and the “Promise Neighborhoods” proposed by the Obama administration. This is based on the idea that people in a community trust their school centers to be a safe community spaces. Our interviewee was resolute about his belief that “culturally specific services get better outcomes for communities, and having them centered at educational centers fosters a sense of safety and belonging.” The most revolutionary thing that the County has done just this year is to nearly double their funding stream and then to split it into two tiers of funding. One tier, 40% of the total, is awarded to traditionally funded groups, divided by region. The remaining 60% is being awarded in a competitive process and only to groups involved in culturally specific service provision, which they have taken month to define as: “those that are informed by specific communities, where the majority of members/clients are reflective of that community, and use language, structures and settings familiar to the culture of the target population to create an environment of belonging and safety in which services are delivered. These services and programs reflect the following characteristics:

- Programs are designed and continually shaped by community input to exist without structural, cultural, and linguistic barriers encountered by the community in dominant culture services or organizations AND designed to include structural, cultural and linguistic elements specific to the community’s culture which create an environment of accessibility, belonging and safety in which individuals can thrive.
- Organizational leaders, decision-makers and staff have the knowledge, skills, and abilities to work with the community, including but not limited to expertise in language, core cultural constructs and institutions; impact of structural racism, individual racism and intergenerational trauma on the community and individuals; formal and informal relationships with community leaders; expertise in the culture’s explicit and implicit social mores. Organizational leaders and decision-makers are engaged in improving overall community well-being, and addressing root causes.

Process

Proposals are judged by a 24-member citizen volunteer committee, none of whom are applicants for funding. In the last funding cycle they reviewed and rated 64 applications for funding; the highest scores among the group are recommended for funding and funded until the budget cap is reached. The interviewee described it as a time consuming and difficult process, but effective. They have not had many direct complaints from unfunded groups, but have had pushback from bigger and traditionally funded organizations, who have cautioned that they may need to lay people off with these kinds of cuts to traditionally funded orgs. Interviewee said that this is unfortunate but “offset by the capacity building that is happening on the other side. It’s a good thing to have a procurement manager who is committed to seeking the best value; they should go out and see if there is a better services model that can get better outcomes for our most vulnerable citizens. That’s just good procurement.” While it is probably too soon to say if the outcomes are better, this is a unique model to watch.

This is the only program COWS spoke with that does not require 501(c)3 status for groups requesting funding, potentially providing more access to smaller groups, though the groups they fund to date are not small organizations.

3. Chapel Hill, NC: “Outside Agency Funding”

Population: 59,635

Contract/grant cycle: 1 year

Outside Agency Funding budget:

\$337,100 for Chapel Hill, \$220,500 for Carrboro, \$1.128 million for Orange County

Number of agencies funded 2015: 45

Award range 2015: \$1,000.00-\$30,000.00

Format: Performance Agreement: Organizations get nothing up front, receive some funding during a mid-year review if they show that they are on schedule to do the work they proposed, and are ideally fully funded at the end of the year term.

Funding source

General Funds

Funding priorities

As identified by are contact they were: (1) Fund safety net services for disadvantaged members, (2) to fund education mentorship and afterschool programs for youth, and (3) to fund programs aimed at improving resident health and nutrition. However, in the common application the funding areas were much more general i.e. health and nutrition, youth services, transportation, housing, etc.

Any partners they work closely with

Town of Carrboro, Orange County.

How and who measures outcomes?

Very broad categories of needs areas are listed in RFP, but nonprofits list their own goals and expected outcomes and are measured against that by the town’s Advisory Board.

Background

Students at the School of Government, UNC Chapel Hill, conducted a Needs Assessment for the town in 2012. Interviewee Jackie Thompson said this process was great and they are looking to do it again now that the economy is changing from where it was in 2012. They had a great experience with the University and no regrets about this process that she wanted to share.

Process

The two towns (Chapel Hill and Carrboro) and the county use one application to streamline the process. Nonprofits can fill out one form and ask for funding from one of three, or any combination of entities. The city (cities, actually – the county process is separate from this point, but Chapel Hill and Carrboro hold their orientation, and their hearings, together) holds an orientation prior to and introducing the new application each year, where they go over the application, the process, and the funding priorities.

While the city and CDBG funding streams are separate, they began using a single common application in FY16-17 for Human Services funding and the CDBG funding. CDBG will have its own committee to review their public service applications, but they hold one orientation and all applications are due at the same time. Applications requesting CDBG funds are required to provide additional documents.

For the town of Chapel Hill

nonprofits apply, and then a 7 member Advisory Board (made up by community members who apply for the position) holds hearings once a week for about two months (March to early May) where they hear from nonprofits requesting funding. These are all open to the public.

In May, the Advisory Board makes its funding recommendations to the town manager, who reviews and then makes recommendations to the town council. The council then holds meetings and votes on final recommendations June. There is no formal appeals process, but all meetings are open to the public and groups are welcome and encouraged to attend council meetings and to advocate their positions.

Accountability

The town does not issue money to groups chosen; instead, they are awarded a “Performance Agreement” which states the work that they are to perform. Nonprofits must file a report twice a year to report back on the progress they have made related to their agreement. If they are on track at their mid-year report, they get a portion of the money promised, with the rest issued upon completion of the work. Jackie says that is both ensures that the groups are highly motivated to do what they said they would do and that the city is not on the hook for a group that either doesn’t perform or dissolves.

Implications

We are wary that this process of allocating funding would prohibit the inclusion of smaller or less organized/funded organizations, which may not have the capacity to do work without prior or ongoing funding. However, those that COWS spoke to (the Human Services director, Town Manager, and Mayor) did not think this to be the case. They noted that in general the application process is fairly simple, and that most groups who apply do get funded if they follow the rules and do the work they say they will do.

4. Columbus, OH

“Competitive Human Services Funding Program”

Population: 822,553

Contract/grant cycle: Variable.

Currently one year with option/expectation to extend up to 3 years total

Competitive Human Services Funding Program budget: \$3-4 Million annually (approx.)

Number agencies funded in 2015: 35

Award range 2015: \$8,730.00 - \$448,919.00,

Format: Contract; nonprofits receive 25% of funding up front, then bill the city for expenses related to the programs.

Funding source

City's General Fund via hotel bed tax

Funding priorities

(1) Safety net: emerging and basic needs, (2) Economic Success: employment and self-sufficiency, and (3) Social Success: safe and healthy individuals, relationships, and neighborhoods.

How and who measures outcomes?

n transition, but generally nonprofits are asked to list outcome expectations and ways to measure them in their RFP; the city council evaluates program performance based on the goals set by the organizations.

The process

This is a new process for Columbus, one decided on based on a study and evaluation of the old process, best summed up in their FAQ: “For decades the City has provided funding to the same programs, without opportunity for new programming. As the City’s population and demographics change, the needs of our most vulnerable citizens change as well. This competitive process will allow the City to align its resources with needs in our community. The three-year cycle will give the City an opportunity to revisit its priorities, and ensure that the programs being funded address the needs of the community.” They created a group to formulate a new plan going forward, made up of about 10 individuals who represented the public sector, the city, county, and large local organizations like the United Way. Based on focus groups, and surveying other options being practiced around the country, they decided that the best route would be to shift to a competitive funding model, whereby no group could expect funding and all groups would have to compete for initial and continued funding. The groups will be funded for the first year with reasonable expectations for extended funding up to three total years as long as they show progress on their outcomes and indicators.

History/context

To test their concept they ran a pilot program in 2013 with a smaller pool of just \$300,000.00 and three broadly defined categories for funding priorities: education, the working poor, and emerging populations. Their full roll out of the program started in 2015. The city recruited a pool of 15 individuals to create a Grant Committee, with heavy recruitment of community members with areas of relevant expertise on public health, housing, education, etc. The process begins with submittal of a mandatory statement of interest to judge whether the program fell under one of the broad funding priorities identified by the city. Using these categories – Safety Net, Economic Success, and Social Success - the Grant Committee rejected groups whose letters of interests indicated programs outside of this funding area. The rest were invited to submit an application for their programs, and invited to attend one of two informational sessions held prior to the application due date. The two sessions were semi-well attended but not mandatory. They did not go into the issue of grant writing in depth, more of an overview of the application process and documentation required. They received more than 100 applications that varied significantly in their quality - many groups neglected to fill out the application completely or to attach all necessary documents. The committee was given the option to have a curing period for groups to fix their applications and voted not to. Organizers regret that, as it caused a lot of animosity from groups, and regret not creating any kind of electronic submission process prior to this effort, as this was all on paper and either through the mail or in person.

Accountability

Agencies get 25% of their funding initially, and then file quarterly reports to track their progress. After the initial 25%, the programs invoice the city for the remainder of their balance. Though the program funding has the potential to last for three years, funding allocations are made on an annual basis. Initial progress reports are spotty this first year, showing much variation in progress to date and the degree to which the measures of progress offered refer in any meaningful way to what their proposals/applications indicated. For this first funding cycle, they have decided to look at it as a learning process for everyone involved and will start to give groups feedback on these progress report so that their next reports are more standardized and measurable. The city doesn't expect to reject any of these programs for continued funding in year two, though they do plan to warn them that if they continue to show a lack of progress or effort to improve their programming and reporting they will not likely be re-funded in year three. They say they want groups to be successful, and that this is a learning and scaling up process for everyone involved.

Lessons

Our interviewee's biggest piece of advice/caution was to consider having the program administered by a nonprofit instead of the city. Distrust and fear of the new process led to some filing open records requests for the scorecards of the Grant Committee, and general harassment of persons on that committee. The fact that scorecard numbers were taken into account for funding decisions but that the numbers did not correlate directly to what programs were funded was a source of anger among unfunded groups. Mandatory rather than voluntary introductory workshops may improve the process; electronic submission of documents would be helpful; plan for any documents used in the process to be public, and treat them accordingly.

5. Chattanooga, TN

“Community Agency Support”

Population: 173,366

Contract/grant cycle: 1 year

Community Agency Support budget: \$4.5 million

Number agencies funded 2015: Approximately 40

Award range 2015: \$10,000.00 - \$705,000.00

Format: Contract via RFP

Funding source: primarily General Fund

Funding priorities

(1) Safer Streets, (2) Growing Economy, (3) Stronger Neighborhoods, (4) Smarter Students, Stronger Families, (5) Innovation, and (6) High Performing Government.

How and who measures outcomes?

While proposals must address one of the six priority areas identified by the city, groups create their own goals and objectives. At the end of each quarter are judged by a newly hired “Performance Manager” to the extent at which they are meeting the goals they set for themselves.

Narrative

Another city which has recently moved away from a “historically funded” model, Chattanooga is notable in that the entire city, directed by its Mayor, has moved to an outcomes-based budgeting model. This means that the city as a whole has adopted a set of outcome priorities that each department is then using as a basis for their priorities and funding. As such, the city’s nonprofit funding program, called the “Community Agency Support” program, has adopted the Mayor’s funding priorities, listed above, as the funding priorities. Every nonprofit must now compete for funding each year by specifically stating how they will work in one of these program areas and providing a set of outcomes to judge their progress by.

Who decides

The city has a five member team assigned to each results area that reviews not just all external agency funding requests but all funding requests for the city (including internal city departmental budgets). All of these entities must respond to the same six funding and outcome priorities. Each five-member team is comprised of at least one recruited citizen, one member of the budget department, one administrative city worker who is not from the area/department that is requesting funding, one representative of the mayor’s office, and one final member who can be from a variety of positions.

Reducing overlap and streamlining services

The program's administrator explained to me that this is just one of many instances in which programs internal and external to the city are being asked to collaborate to reduce the overlap in service programming. As a practical matter, nonprofits seeking funds are required to talk to city administrators and agency leaders to look for opportunities to collaborate and avoid duplicating resources or programs. They are required to say in their applications how they will work with city agencies and other nonprofits, and the panel who decides funding takes this into consideration when making funding decisions.

Accountability

The program is pretty new, and it is difficult to show how much progress had been made to date, though the city's CFO, who COWS spoke with, says that anecdotally the program seems to be working. The competitive process has opened the door for many smaller and historically unfunded agencies to work with the city, and there seems to be more collaboration between agencies and nonprofits. The city requires performance measures to be included in the RFP, and requires quarterly reports from funded agencies. These are sent to a person in the newly created position of "Performance Manager" to judge the extent to which funded agencies are doing what they said they would according to their own self-proclaimed indicators. The CFO emphasized that the groups are measured against the indicators they themselves created, not by any measure the city comes up with. This ensures that groups are accountable to what they said they would do, do not feel judged unfairly, and opens up the possibility of performance measures that are not strictly numerical.

Lessons

They say that while the quality of the applications is improving, it's been quite a process to move to this competitive model. Their workshops for nonprofits prior to the application process are mandatory, but are more an overview of the process and not an in-depth explanation of the RFP. They do have a review period after initial submission of proposal, during which time the city will review applications and contact organizations with questions, follow up, and clarification. Many organizations lack the capacity to provide all the information that the city is asking for in a meaningful and cohesive way within a reasonable time frame, but the city tries to connect those people with assistance if they are aware of it. Even established nonprofits complain at the amount of time it takes to assemble all the information required, in many cases just to be turned down for funding. In response, the CFO has said that they will move to a process whereby applicants submit a preliminary/ pared down version to determine if their project is likely to be funded, which only likely applicants required to move to the more stringent and lengthy application process.

III. ADDENDUM

Follow up with Patricia Holliday, CHSP (Tallahassee, FL) and Jackie Thompson, Outside Agency Funding (Chapel Hill, NC).

Please note: Most cities/counties are in midst of their competitive process, and we received responses on follow up questions from only two cities. We spoke to both over the phone and via email. Tallahassee, FL, offered the most insight in to the issues that concerned the Madison CDD, and this addendum focuses on them, though we have included responses from Chapel Hill where relevant or informative. In addition, you'll see references to some additional documents that were requested by CDD, including sample contracts from both cities, (see Appendix C).

We compiled the following questions resulting from our Feb. presentation to CDD Staff:

1. How many agencies get turned down in each cycle?
2. If it's possible to see any sample contracts – how complicated/long are they? Are ones that use CDBG money longer/more complicated? Is there a threshold below which agencies don't need a contract?
3. What are the different funding sources (exactly) in the numbers we provided? How much is city levy? How much is from partners (like United Way)? How much is HUD? Do all of these funds use this competitive process?
4. In Tallahassee, Multnomah County, and Chapel Hill: How much does the county's human services budget is applied to this? Are they holding back a part of their money for other mandatory spending needs?
5. Are any cities reserving a portion of their budget for evaluation?

We customized this list of questions to each community's situation and sent these questions to our contacts via email, then followed up with phone calls. To date, as noted above, only two cities have responded. We will forward other responses if and when they become available. Where it is possible to address these issues without follow up and referring to available documents, we have provided that information as well.

On number of agencies that are turned down:	
Tallahassee	approximately 5-8 agencies per year.
Chapel Hill	approximately 4 agencies per year.
Columbus, OH	59 agencies turned down in 2015.
Chattanooga, TN	12 agencies turned down in 2015.
Multnomah County, OR	approximately 20-30, though this process is not very comparable in this way.

On Funding Streams, and Sources

They still have the CHSP, which takes the bulk of staff time. They do not hold back any portion of funding for the city to do evaluations - that is conducted by the 3 city staff dedicated to Human Services - though the majority of it falls to our contact there, Patricia Holliday. They have discussed funding organizations just to do evaluations. See below - pilot project for Promise Zones with Florida State University.

One thing they tried last year was to leave out site visits/scoring by volunteers. They did this because HS staff already does separate site visits and they wanted to limit/control volunteer time. Turns out that both the agencies and volunteers said that they did not like the removal of the site visits and they've restored them this year. Holliday gave us their site visit schedule (and we have the scoring sheet they use during site visits) if you'd like to take a look; refer to "Volunteer site visit schedule."

Holliday also sent a breakdown of funding for each agency (general revenue, CDBG, county, etc.); please refer to "2015-16 Grant Summary funding sources."

In addition to CHSP, the city is attempting a new special funding cycle aimed at targeted funding for extreme poverty with 10 projects. These projects build capacity and provide indirect client services (in contrast to CHSP programs, which fund direct client services).

Finally, they have added a 3rd area of funding for "Promise Zones" that use a variation of the CHSP Competitive process applied to an identified high risk area. This is a pilot phase, and could be rolled into the CHSP process (as, for example, its own priority funding area) in the future. They did a separate needs analysis of the Promise Zone area to come up with the four priority funding areas for that. They are also testing out new mandates for collaboration/linked services with these contracts - she describes it as moving towards the federal/HUD requirements for promise zones and she thinks that everything in HS/CD is moving in that direction. To this end, they are also piloting a new evaluation method, whereby students and staff at Florida State University will donate time to evaluate the success of these programs. This would constitute a pilot of seeing if a separate evaluation process could be helpful - Holliday notes that real, effective evaluation requires an entirely different set of skills from providing services. We elicited this response in asking about whether they've ever considered withholding a certain amount of funding for evaluation. The answer is no to that specifically, but this tactic will explore whether a different evaluation process might produce better outcomes, whether funded or donated via the university.

Regarding contracts

The city and county use the same contracting template; the United Way uses a Memorandum of Understanding. Programs that use federal funds require a slightly different contract for federal guidelines (keeping financial records for 3 vs. 5 years, for example). Holliday sent the template for each of the contracts: General Revenue, Promise Zone, and CDBG/Federal, (see Appendix C). There is also a blank copy of the contracts used by Chapel Hill, NC.

Regarding complexity of contracts

While the contracts differ because of city, state, and federal requirements, they are not substantially different. And they use the same contract whether they are for \$5,000.00 or \$5,000,000.00. Holliday said the main difference is how an agency responds in the "Work Plan" section - namely, if they are requesting \$500,000.00 they should have a lot more in their work plan than an agency requesting \$5,000.00. Note that we received a nearly identical response from Chapel Hill.

On creating a truly competitive, collaborative process. In general, regarding the CHSP program, Holliday wanted to stress that it is a process, not a destination. She says they change aspects of the program every year to test them, pilot new ideas, and respond to volunteer and agency feedback (which they solicit every year). She says that when they started this process 20 years ago, it was very hard. It was hard to get all three entities to the table, and started with months of meetings as an initial "Joint Planning Board," comprised of staff from each entity. They adopted a competitive process and gradually added lots of the other components. For example, they started with Citizen Review Teams, but soon realized that the CRT's lacked diversity and were perceived as biased, so they instituted a "diversity plan" and required extensive information from volunteers about their race, ethnicity, occupation, sex, etc.

APPENDIX C:

CDD Funding Process Study Tools and Resources

Compiled by Center on Wisconsin Strategy
and Submitted by Forward Community Investments to
the City of Madison, Community Development Division

March 2016



2045 Atwood Ave, Ste 101A
Madison, WI 53704

608.257.3863

www.forwardci.org



Annotated Bibliography of Tools and Resources Related to Funding Process Reform

Please note that some of the documents listed below are available online. For those documents that are not available online, FCI has provided the electronic files to CDD.

Related to: Needs Assessments / Determining Priorities / Priorities

- Town of Chapel Hill, “*Human Service Needs in Chapel Hill.*” Needs Assessment, 2012.
<http://www.townofchapelhill.org/home/showdocument?id=19416>
- City of Tallahassee, “*CHSP Needs Assessment and Process Evaluation Final Report.*” Needs Assessment, 2010.
<https://www.talgov.com/Uploads/Public/Documents/ecd/community/pdf/chspneeds.pdf>
- Boulder funding priorities outcomes and indicators: Lists priorities and indicators of success. (Doc)
- Tacoma Funding Priorities: Lists funding priorities. (Doc.)
- Chattanooga priorities areas: Details funding priorities and indicators of each. (Doc)
- Columbus Broad HSF Categories:
More details on the three broad funding priorities identified by Columbus. (Doc)
- Public Health, Madison Dane County (PHMDC), “*Defining Scope: PHMDC Checklist.*”

Related to: Presentation of Material / Online Accessibility / Application Process

- City of Tallahassee, *CHSP Portal.*
<https://www.chspportal.org/>
- City of Chattanooga, *Budgeting for Outcomes Portal.*
<http://connect.chattanooga.gov/bfo/>
- City of Tacoma, *Human Services Contracting Portal.*
http://www.cityoftacoma.org/government/city_departments/neighborhood_and_community_services/human_services_division/human_services_contracting/

Related to: Application examples

- Town of Chapel Hill, “*Main Common Application.*”
<http://www.townofchapelhill.org/town-hall/government/boards-commissions/standing-boards-commissions/human-services/agency-funding>
- Town of Chapel Hill, “*2016-2017 Funding Application Instructions and Information.*”
<http://www.townofchapelhill.org/town-hall/government/boards-commissions/standing-boards-commissions/human-services/agency-funding>
- Town of Chapel Hill, 2015 Application Form. (Doc)
- Columbus Full Application – FINAL: Application for funding. (Doc)
- Multnomah County SUN Service RFP 11.6.15: RFP for the SUN Service Programing. (Doc)



Related to: Agency Education & Orientation

- Chapel Hill 1015_16 Orientation Presentation:
PDF of the presentation slides offered during agency orientation. (Doc)
- Chapel Hill 2016 Application Submittal Checklist. (Doc)
- Columbus Human Services, Letter of Intent. (Doc)
- Chattanooga Kickoff Video 2016:
Not the actual agency training, but a presentation about what they learned from their first year, an overview of the process, and what they have changed because of first year feedback.
<https://drive.google.com/file/d/0B7xZEm1fB1QDeWZzY0ZoQlktSEk/view?ts=565e244c>
- Tallahassee 2015-2016 Agency Training Agenda. (Doc)
- Tallahassee Agency Site Visit Memo

Related To: Citizen Engagement in Citizen Review Teams and Community Engagement, in general

- Tallahassee 2015-2016 CRT Vol Recrt Cvr Ltr:
Letter sent to all volunteers who sign up to participate in Tallahassee's process. (Doc)
- Tallahassee, Volunteer Assessment Guide. (Doc)
- Tallahassee, Monitoring Document. (Doc)
- Tallahassee, Volunteer Site Visit Schedule. (Doc)
- Otte, Kelly, The Tallahassee Democrat, 9/26/15, "Grant Process shows extraordinary generosity of people." Op-Ed about the CRT process in Tallahassee. <http://www.tallahassee.com/story/money/2015/09/26/grant-process-shows-extraordinary-generosity-people/72803224/>
- COWS, Mayors Innovation, "Cities Facilitating Meaningful Civic Engagement"
<http://www.mayorsinnovation.org/events/summer-2014-meeting>
- COWS, Mayors Innovation Project (MIP), "Involving Your Community,"
Building Livable Communities Forum in Burlington in 2014
<http://www.mayorsinnovation.org/events/building-livable-communities>
- COWS, MIP, "Cities at Work", page 274:
http://preview.mayorsinnovation.org/images/uploads/pdf/CitiesAtWork_FullReport.pdf
- COWS, MIP, Summer 2012 meeting on "Better Outreach to Engage Stakeholders."
http://preview.mayorsinnovation.org/images/uploads/pdf/MIPSection4_StakeholderEngagement.pdf
- COWS, MIP, "A District that Works: Washington D.C." brief, page 47:
http://www.mayorsinnovation.org/images/uploads/pdf/DC_Report_Final.pdf
- COWS, MIP Boston Brief, "A Boston that Works: Recommendations for Building Good Jobs and Strong Communities," page 25:
http://www.mayorsinnovation.org/images/uploads/pdf/A_Boston_that_Works.pdf



Related to: Determining Winners

- Chapel Hill Board Guidelines: Outlines the Human Services Advisory Board duties and process for arriving at funding decisions. (Doc)
- Chattanooga BFO FY17 Scoring Guidance: Details the basis for scoring agency applications. <https://docs.google.com/document/d/1Gi13s7hmK2Tv5hUwNUzSqtebSuVOxV7LPgCjAzustVg/pub>
- Columbus 2015 HSF Scoring Sheet:
Document used by volunteers in Columbus to rate agency applications. (Doc)
- Columbus 2015 HSF Scoring Instructions: Instructions for using the Columbus 2015 HSF Scoring Sheet to determine which agencies are funded. (Doc)
- Tallahassee 2015-2016 Volunteer Assessment Guide:
Document used by volunteers in Tallahassee to rate agency applications. (Doc)

Related to: Measuring Outcomes

- City of Tacoma, “*Measuring Impact and Effectiveness.*”
Tacoma’s guidelines for measuring outcomes, as well as other program information. <http://www.cityoftacoma.org/cms/one.aspx?portalId=169&pageId=5844>
- Columbus 2015 Human Services Activity Report fillable form FINAL:
Quarterly reporting document used by agencies to report progress. (Doc)
- Tacoma How to Calculate Achievement:
Detailed description of the process used to calculate achievement for each indicator. (Doc)

Related to: Nonprofit Capacity Building (Other Considerations)

- San Francisco Resources for Nonprofits: City and non-city resources for nonprofits, including information on technical and financial assistance, networking, and physical placement. <http://www.oewd.org/index.aspx?page=250#Funding>
- San Francisco Citywide Nonprofit Monitoring and Capacity Building Program, designed to “save City taxpayers and nonprofits time and money by consolidating **fiscal and compliance monitoring** when a nonprofit receives funding from more than one City department.” <http://sfcontroller.org/index.aspx?page=788>

Related to: Improving Access (Other Considerations)

- City of Columbus, “*Competitive Human Services Funding Program- Letter of Intent.*”
The LOI for Columbus, and their attempt to pre-screen agencies to make sure they fit the funding interests and avoid wasting resources to respond to a longer RFP. (Doc)
- Denver 2016 Race and Justice Design Challenge Mini Grants: New funding available to “residents and civic organizations that design community driven projects to unite youth and law enforcement, promote inclusion and equality for more connected neighborhoods, identify and address community needs, and cultivate a climate of hope.” Max award of \$3,000.00, with a requirement for matching funds. <https://www.denvergov.org/content/denvergov/en/human-rights-and-community-partnerships/news-events/2016/2016-immigrant-integration-mini-grant-application-period-open-.html>
- Denver 2016 Immigrant Integration Mini-Grants: Second year of funding available for “small, community driven projects designed to bridge immigrant and receiving community, create stronger and more connected neighborhoods, address community needs and foster community pride.” Ten total awards of \$1,000.00 with a requirement for matching funds. <https://www.denvergov.org/content/denvergov/en/human-rights-and-community-partnerships/news-events/2016/2016-immigrant-integration-mini-grant-application-period-open-1.html>



Related to: Other system models

- Multnomah County, “*Sun Service System Delivery Model.*” Page includes the Service Delivery Model, Theory of Change, and many other foundational documents.
<https://multco.us/sun/sun-service-system-service-delivery-model>
- Tacoma Contracting Policy:
Outlines the process, payment schedule, and ways to measure impact. (Doc)
- City of Tallahassee, “*CHSP 2-15-2016 Description Manual.*” Full description of the CHSP model.
<https://www.chsportal.org/uploads/files/CHSP%202015-2016%20Description%20Manual.pdf>

Related to: Examples of Contracts

- Chapel Hill Blank Performance Agreement 15-16: Blank Contract for Services for Chapel Hill. (Doc)
- Tallahassee CHSP 2015-2016 GR CONTRACT: Blank contract for CHSP General Revenue funding. (Doc)
- Tallahassee 2015-2016 CDBG Contract: Blank contract for CDBG funding through the city. (Doc)

Miscellaneous Documents of Interest

- Columbus FAQ Updated 5-14-14: FAQ based on common questions about the process, includes information on who was funded last cycle, funding sources, etc. (Doc)
- Tallahassee site visit memo to agencies:
Outlines guidelines for successful site visits and presentations to the CRT. (Doc)
- Chapel Hill 2015-2016 Funding:
Lists agencies funded (and funding amounts) by Chapel Hill in 2015. (Doc)
- Chattanooga FY16 Agency Support:
Lists agencies funded (and funding amounts) by Chattanooga in 2016. (Doc)
- Multnomah County CSAW Funding by agency program:
Lists agencies funded (and funding amounts) by Multnomah County in 2016. (Doc)
- Tallahassee 2015-16 CHSP Allocations:
Lists agencies funded (and funding amounts) by Tallahassee in 2015. (Doc)
- Tallahassee 2015-16 Grant Summary funding sources: Shows breakdown of source of funds (CDBG, General Revenue, etc.) for agencies funded by Tallahassee in 2015. (Doc)