

# Council Work Session

## Community Partners Board Process Update

November 20, 2018



## Community Partners Board Current Process

- Early November
  - Application and Website Available
  - News Release and Marketing
- Mid-November
  - Funding Process Kickoff Session
- Early-December
  - Technical Workshop Session
    - to assist potential partners with application completion
- Late-December
  - Deadline for ALL application materials



## Community Partners Board Current Process

- January through February
  - Initial Staff Review for Completeness
  - Community Partners Board Application Review
  - In-person Interviews with requestors
- April
  - Community Partners Board Recommendation to City Manager
- May
  - Recommendations from City Manager to the City Council for consideration
- June
  - Final funding determined by City Council through Budget Adoption



# Community Partners Board Current Process

## Application Criteria/Information

- **Current Active Nonprofit Status**
  - 501 (c)(3) IRS Status
  - Active NC Secretary of State Status
- **Financial Documentation**
  - IRS 990
  - Audited/Reviewed Financials
- **Association with City Goals**
  - Link with current City Goals described
  - Performance metrics
- **Organizational Capacity**
  - Mission, staffing, and experience
  - Program and organization budget information



# Community Partners Board Current Process

## Board Review Criteria

- **Organizational Capacity**
  - Is the community partner able to implement and manage the program? Does it align with the community partner's experience and mission?
- **Collaborative Efforts**
  - Has the community partner explored working with other agencies? Does the project receive other sources of funding from the community? Is there another service provider in the area?
- **Connection to City Goals**
  - How does this request directly or indirectly affect City Goals?
- **Performance Measures & Impact of Service**
  - Does the community partner provide a history of past performance measures that demonstrate effective services or programs?
- **Impact of City Funds on Operations**
  - What impact will the level of City funding have on the organization's ability to provide services and achieve results?



## **Community Partners Board Current Process**

### **Ongoing Supervision**

- **Quarterly Financial and Performance Reports**
  - **Provides information on how funds are used**
  - **Provides metrics and context to the impact of the funds**
- **Annual Financial Compliance Review**
  - **Financial review performed by the City's Internal Audit staff to ensure proper use of funds**



## Community Partners Board Process Recommendations

### **i) Support for New and/or Small Organizations**

- New requestors required to attend the technical workshop
- Emphasize financial requirements and detailed cover letter
- Continued use of 3<sup>rd</sup> party review requirements
  - o > \$25,000 = full audit
  - o \$25,000 or less = review of financial statements



## **Community Partners Board Process Recommendations**

### **ii) Funding Organizations Directly vs. Pass-through Funding**

- Fund direct requests only, no pass-through funding

### **iii) Funding Limits by Dollar Amount and Number of Years**

- Requests limited to 25% of the organization's previous operating budget
- Limit funding to 3 consecutive years, with 2 years without funding before becoming eligible again





## **Community Partners Board Discussion/Feedback from Council**

### **) General Requests**

- Clearly defined City Council priorities and goals related to this funding process
  - Organizations receiving funds from multiple City sources
  - Requests for services/projects outside of core City Functions

### **) Categories Used Previously**

- Council feedback related to categories:
  - Economic Development
  - Arts and Culture
  - Community Services (including Human Services)



## **Proposed Process: Option 1 Calendar Year Board Review**

- **Maintain Current Board Role**
  - Board accepts, reviews, and makes funding recommendation from community partners
- **Council Adopts Overall Funding Amount**
  - Council would adopt a set amount of available funding for community partner requests as part of the annual budget process
- **Board Provides Funding Recommendations Outside of Budget Process**
  - The Board would make funding recommendation after budget adoption and for the following calendar year



## **Proposed Process Option 2 Lead Agency Grants**

- **Council Adopts Overall Funding Amount**
  - Council would adopt a set amount of available funding for community partner requests as part of the annual budget process
  - Funding adopted by category to support priorities
    - Arts & Culture
    - Economic Development
    - Community Services
    - Other priorities identified by Council
  
- **Council Awards Funding to Lead Agencies to Manage Grants**
  - Granting of funds would be administered by lead agencies that have existing grant process in identified priority areas
    - ArtsGreensboro, United Way, Greensboro Chamber, etc.

