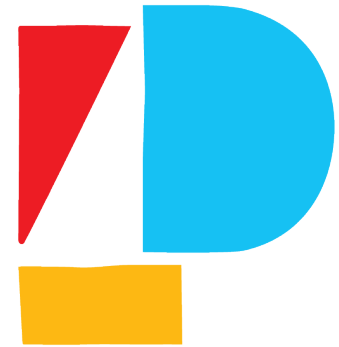




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**Small Grants Fund: Renewal
Recommendations
10/17/23**

Grant Renewal Process Overview

- June: Allocation Committee approved funding formula for small grants renewal, and Conclusion of Fiscal Review Process
- August: Annual Report and Spending Analysis
- Mid-September: Performance Summaries and Renewal Recommendations sent to grantees

Small Grants Fund Financial Review

- Independent CPA firm met with financial staff from SGF agencies to review finances and financial practices.
- Overall, positive results. One grantee with no concerns, 4 grantees with one minor concern, and one with 4 minor concerns.
- Merina & Co. will provide 2 trainings for SGF financial staff.

Renewal Period & Funding Formula

Renewal Period: 2.5-years, January 1, 2024- June 30, 2026

- Aligns Small Grants to same fiscal year as large grants
- Provides time for community engagement, Community Council and Allocation Committee to address key policy questions for next small grants funding round

Renewal Formula same as used with large grants

- 40% of total 3-year grant award
- 4% COLA compounded annually
- All renewal recommendations are “up-to” amounts contingent on performance and spending

Annual Data and Spending

- 449 youth served in FY23, exceeding the goal of 373.
- Nearly 70% youth met goals for program attendance.
- In FY22, SGF grantees met 7 out of 10 outcome goals; met 7 of 7 goals reported FY23.
- In FY23 all 8 disability inclusion goals were either completed or in progress.
- 6 of 7 grantees spent 93%-100% of FY23 budgets

Quotes from Grantee Partners

“...as a result of their consistent participation for the last 3 years, most [youth] have increased confidence in their ability to navigate the social and educational systems, and are empowered to have a strong inclination towards pursuing after school programs such as Upward Bound, Rise, Sun School, and more. This shift in confidence and agency represents the primary objective and aim of our youth program, as we strive to empower them to integrate into the education system alongside their peers.”

- Staff of EECRC

Quotes from Grantee Partners

“We are extremely proud of the notable increase in attendance within our middle school group, an age group that has consistently struggled with attendance. We attribute this uptick to a significant overhaul in curriculum (co-created with students and driven entirely by student voice) to ensure engaging, age-appropriate offering”

- Staff of Portland Tennis & Education

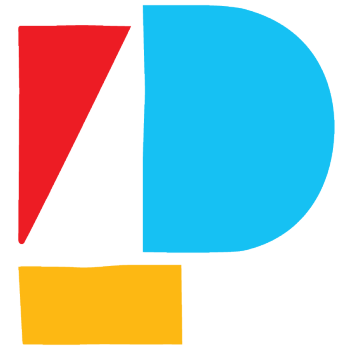
Recommendations

All recommendations are for full funding formula.

Organization	Program Area	2.5 year Maximum
African Youth Community Organization (AYCO)	Afterschool	\$194,967
Camp Elso Incorporated	Mentoring	\$196,305
Portland Tennis and Education	Mentoring	\$196,305
Brown Girl Rise	Mentoring	\$62,162
Elevate Oregon	Mentoring	\$186,212
Ethiopian & Eritrean Cultural Resource Center (EECRC)	Mentoring	\$116,416
Urban Gleaners	Hunger Relief	\$138,216
TOTAL		\$1,090,583



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Community Council Update

Community Engagement Overview

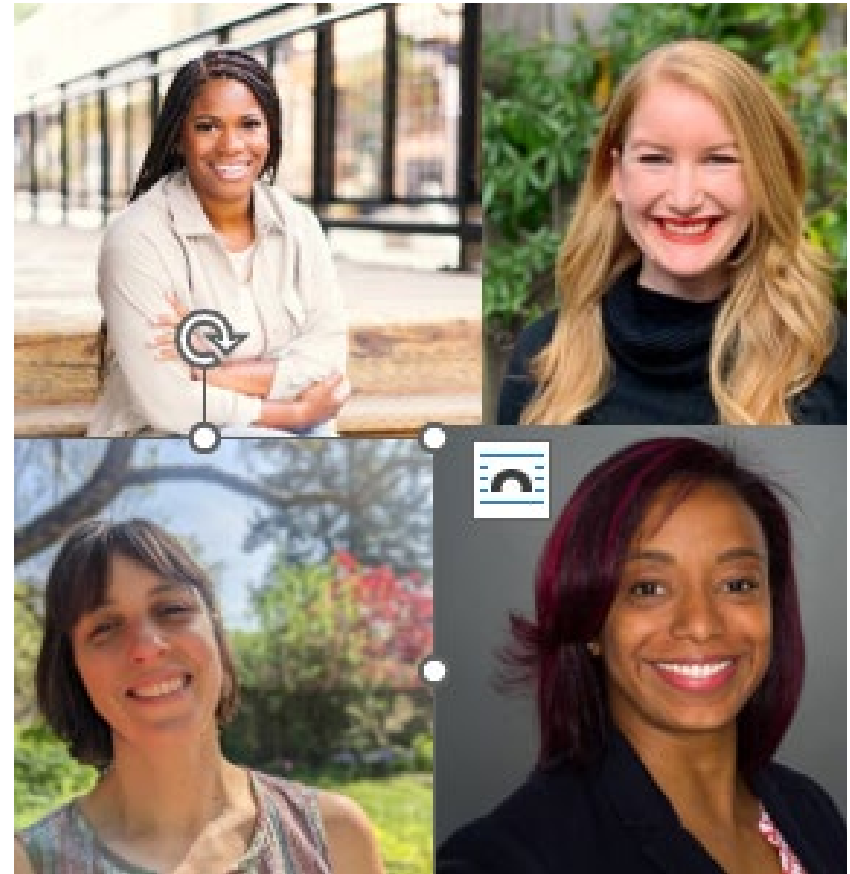
Before a competitive funding round, PCL is required to:

- Engage the community to understand service needs
- Engage community in a variety of ways such as surveys, focus groups, key stakeholder interviews and meetings open to the public
- Use community engagement results to create program area goals and strategies for funding

Community Engagement Implementation

Camille Trummer and Team

- Survey design and transcreation in 6 languages
- Outreach and survey implementation; 250-300 surveys completed
- Focus groups (8-10)
- Key stakeholder interviews (up to 10)
- Data analysis: survey, focus groups, interviews
- Report results



Community Engagement Implementation

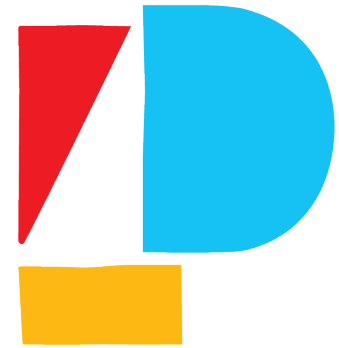
Community Engagement Liaisons (CELs)

- Outreach to culturally specific communities in up to 26 languages
- Support completion of 300 surveys
- CELs can provide oral interpretation of surveys to aid community members in responding to questions





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Community Council Update

Community Council Updates

Community Council Membership

- Filled 2 vacancies in summer recruitment, Cathie Pederson and Deian Salazar.
- Experience in public health, youth with disabilities, foster care, resident of East Portland, grantmaking
- Have an alternate who will fill in if another member resigns
- Council has 13 members with range of experience in Levy's program areas, related sectors, with priority communities

Funding Process: 3 Areas of Focus

Application Process

- "Request for Investment" (RFI), funding priorities, various policies related to grant requirements

Review Process

- Scoring criteria, reviewers, staff summaries/data analysis of all applications

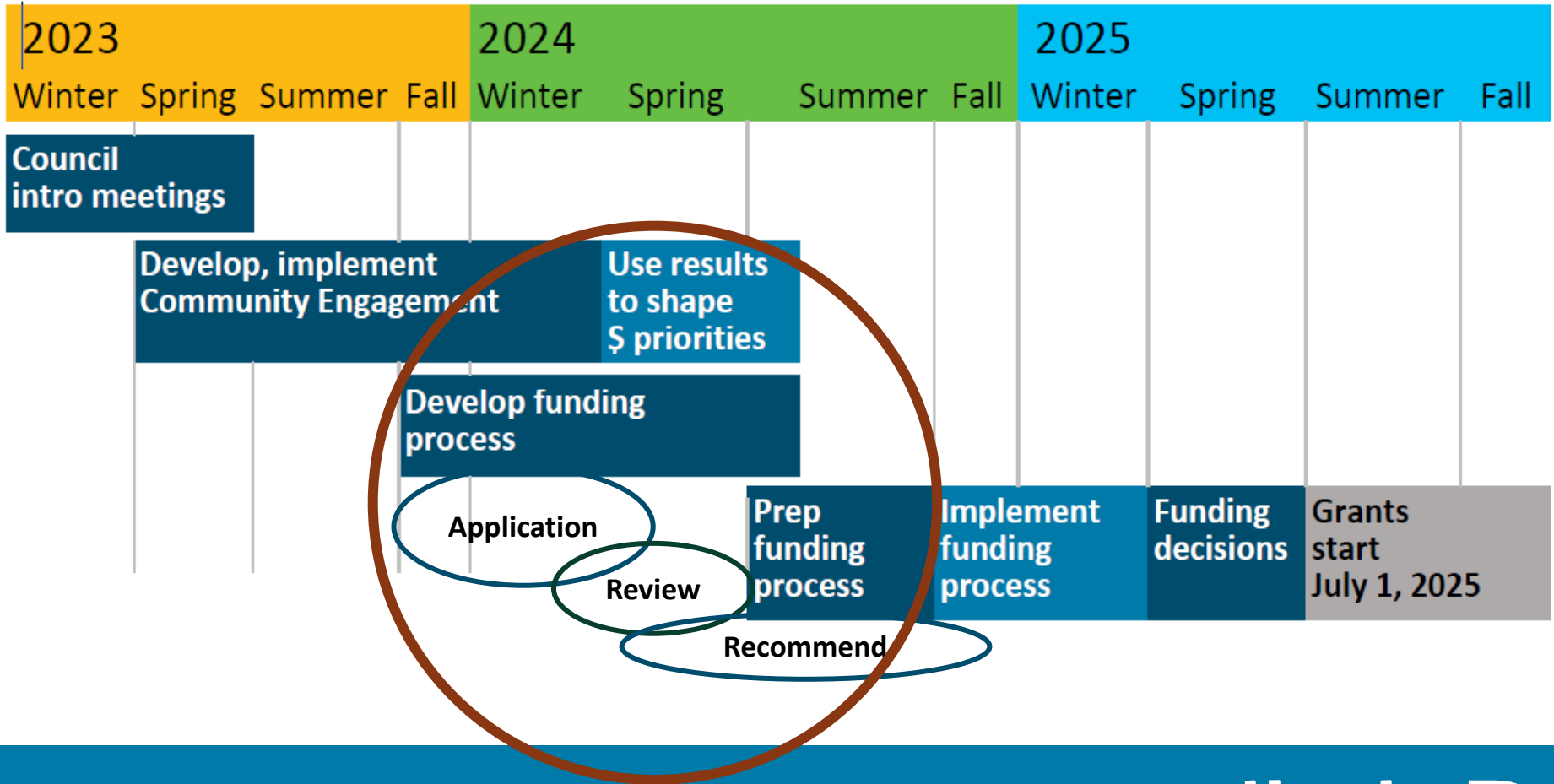
Funding Recommendations

- Staff's recommendations, Council's input on recommendations, applicant testimony

Develop Funding Process Tentative Timeline

- **Sept- Dec 2023:** Drafting application/scoring criteria, begin review process considerations
- **Jan- Mar 2024:** Finalize application/scoring criteria template; continue to develop review process
- **Spring 2024:** Finalize review process; use community engagement results to identify funding priorities; incorporate funding priorities into application
- **Summer- Fall 2024:** Develop/finalize process for Council to provide input on staff's funding recommendations

Big Picture: Phases & Timeline



Application Topics for Council Input

- A. What are the **most important qualities of an organization** that should receive PCL grants? Why?
- B. What **important information is needed about the program (services)** an applicant wants funded to decide whether to fund it?

Goal is simplification of the application. Balance of: burden to applicant and what's necessary to judge the application.

What's Ahead

Application

- comparing Council input to past PCL application questions for what's missing/more simplification
- prioritizing which information matters most to develop scoring criteria

Review process

- Orientation to past process; reviewer feedback; advantages and disadvantages to process