

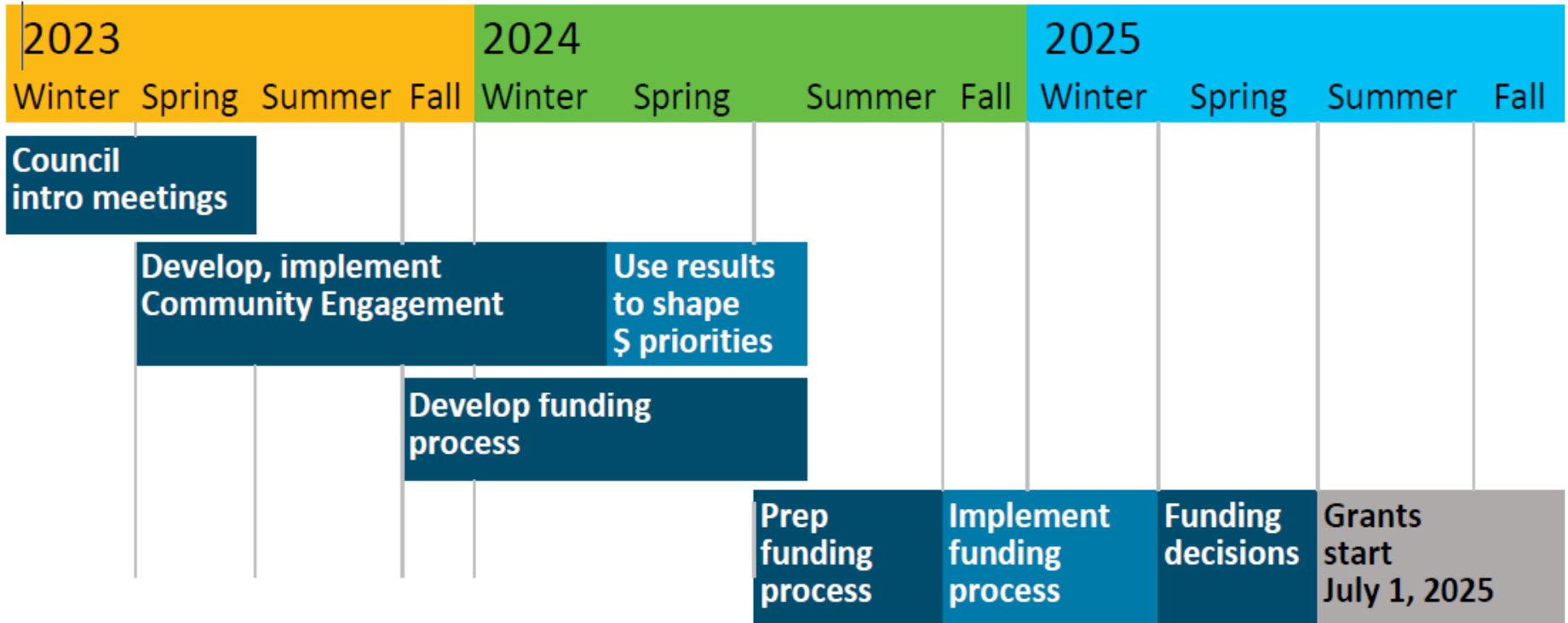


portland children's levy



2024-25 Funding Process Planning & Timeline

Big Picture: Phases & Timeline

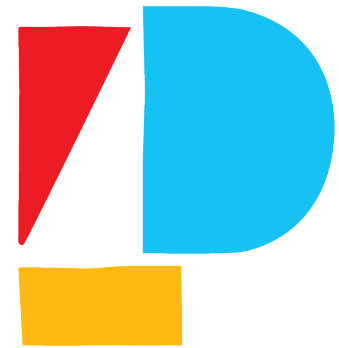


2024 Funding Round Planning

- **March AC Meeting:** Draft application questions and scoring criteria ready for review and feedback
- **May Joint Allocation Comm/Community Council Work Session:** Community engagement results and recommendations presented; questions and discussion
- **June AC Meeting:** Review and final approval of application including questions, scoring criteria and funding priorities for each program area
- **September:** Publish funding application
- **December AC Meeting:** Summary of applications received; review staff and community council recommendation process/criteria and funding decision process



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Community Council Update
Allocation Committee, 12/11/23

2019-20 Funding Process: Feedback

REVIEWER SURVEY (54/65 reviewers)	APPLICANT SURVEY (44/131 Individuals)
+ 100% satisfied with experience as reviewer	+ 85% satisfied with PCL staff's communication throughout funding process- Q/A, score sheets, recommendations
- Most frequent mention for improvement: simplify application	- 20% dissatisfied with decision-making process: didn't understand Allocation Committee's rationale or process used to make decisions

Developing Application Template

- September: Council brainstormed key topics
 - Qualities of organizations for PCL grants
 - Information needed about program services that applicants want funded.
- October: staff cross-walked brainstormed topics to previous PCL funding application; overall alignment
- November: Council focused on simplifying application: delete, change, add from previous application

Organization Qualities

- **Purpose/mission**, history, current goals of the organization
- **Clients, staff, board, community partnerships** align with purpose/mission. Use of qualitative and quantitative data.
- Understands and responds to **community needs**. Methods for understanding their impact, and examples. Narrative and storytelling focus in this section.
- **Fiscal responsibility** of the organization.

Program Services

- **Overall program plan:** need, who will be served, engage community to offer the program, program activities and staffing to be funded by PCL.
 - Intensity of services to understand breadth vs. depth of services with number of clients to serve and costs.
- **Equitable outcomes:** intended impacts of program, and engage community to understand impacts
- **Program Budget:** simplify budget form and instructions; consider whether 15% administrative allowance is too low.

Application Template Considerations

- Racial equity, diversity, inclusion considerations in organization qualities and program activities.
- Definitions
 - racial equity, diversity, inclusion
 - Accessibility
 - being served
- Tables: tension of breadth/depth and technical barriers. Offer opportunities for narrative with tables.
- Program as “new” or “expansion of current work” or “continuing current work”
- Scoring criteria and point values still need to be developed

Developing Template: Next Steps

December/January: Staff draft application template and scoring criteria based on Council feedback. Send draft template and scoring criteria to potential applicants to gauge *understanding, reasonableness, other feedback?*

- current grantees (50)
- other community-based organizations (140+) including past applicants

February: Analyze feedback on template/scoring criteria. Present to Council for any other key feedback. Keep iterating template.

March - June: Present template to Allocation Committee. Make final refinements. Prep template for incorporating funding priorities (after community engagement results).

Developing Review Process

Overview 2019-20 review process

- 65 community volunteers, with stipends
- High satisfaction by reviewers
- Challenges with score variation

Staff asked Council to brainstorm pros/cons to 2 options:

- Continuing review by stipended volunteers
- Hiring a diverse cohort of 12- 15 contractors to review

Developing Review Process

Stipended Community Volunteer Pros

- builds awareness of PCL in the community
- increases community investment in PCL
- offers potential professional development opportunity to community members
- the stipend may attract people to participate who could use it and assure that the reviewers aren't only people who can afford to volunteer their time

Stipended Community Volunteer Cons

- workload for staff managing volunteers, scoring variance

Developing Review Process

Cohort Short-term Contractor Pros

- Pay for training time and require longer, more intensive training
- Paying wages may ensure a diverse, representative group of reviewers
- Easier to convene smaller group of contractors to address score variation
- Paying wages may ensure contractors complete the review work

Short-term Contractor Cons

- potential biases of a small group of contractors with expertise in the youth/family services sector in Portland depending on people/organizations they know or have worked with
- reluctant to have process that favors “experts” as reviewers rather than community voice and perspective

Developing Review Process: Next Steps

Council requested more information for next meeting:

- Length of review period
- Training content and how it could reduce score variation
- Any feedback about the review process in applicant survey from 2019-20

Council to have deeper discussion, begin developing recommendations for type of review process to use.

Staff to bring recommendations to Allocation Committee once ready.