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**Community Council Meeting**
**March 3rd, 2025**

**Katrina speaking**

**Welcome**
Thank Holgate Library for hosting us
Name bathroom locations

**Meeting Outcome**

1. For the Community Council to recommend 1 portfolio of applications to the Allocation Committee for funding.

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Katrina speaking

**Welcome**
- ☐ Thank Holgate Library for hosting us
- ☐ Name bathroom locations, food & water

**Overview of what we're doing today**
We have one outcome for today's meeting: for the Community Council to recommend 1 portfolio of applications to the Allocation Committee for funding.

We'll get there by following a process similar to the one we used in January. We'll:
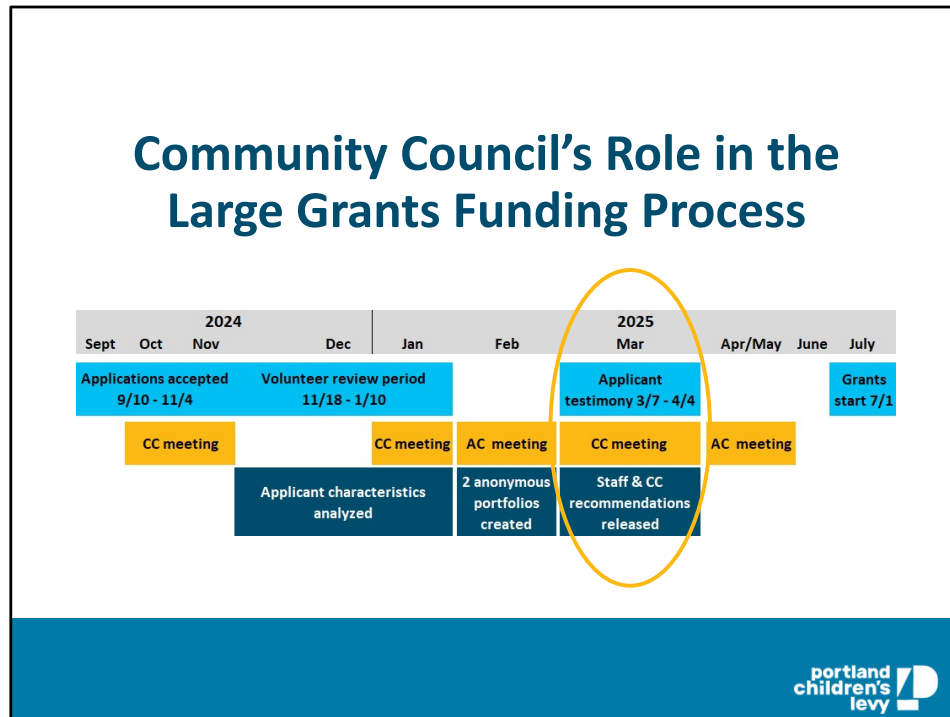- ☐ review the large grants funding process and today's voting process
- ☐ disclose conflicts of interest
- ☐ present the two portfolios and answer questions
- ☐ move into Council group work: initial poll, pair work, large group discussion, and solo reflection
- ☐ and close with a vote. Whichever portfolio receives a majority of the vote will be recommended to the Allocation Committee for funding.

We'll have two 10-minute breaks at 2:15 and 3:30.

Any questions about today's meeting outcomes or the agenda?

Finally, I want to encourage everyone to go to the bathroom, get water, grab food, eat, stand up, stretch, and move around as you need to – even when it's not break time.

## Community Council's Role in the Large Grants Funding Process

| | 2024 | | | | 2025 | | | |
|---|---|---|---|---|---|---|---|---|
| Sept | Oct | Nov | Dec | Jan | Feb | Mar | Apr/May | June | July |

| Applications accepted 9/10 - 11/4 | Volunteer review period 11/18 - 1/10 | | Applicant testimony 3/7 - 4/4 | | Grants start 7/1 |
|---|---|---|---|---|---|

CC meeting · CC meeting · AC meeting · CC meeting · AC meeting

Applicant characteristics analyzed · 2 anonymous portfolios created · Staff & CC recommendations released

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**Katrina speaking**

I'm going to review how the Community Council is engaging in the large grants funding process for both council members as well as members of the public and applicants. This visual is a high-level timeline of who and what is involved in the large grants funding process. The light blue/top bar refers to activities that applicants and community members are engaged in. The yellow/middle boxes are points where you, our Community Council, or the Allocation Committee, are engaged. The dark blue/bottom boxes describe staff deliverables.

Today, the Community Council will discuss and weigh two portfolio options of grantees. Shortly, staff will review the process used to craft these two portfolios. At the end of the meeting the Council will take a vote: whichever portfolio receives a majority of the vote will be recommended for funding to the Allocation Committee. There will be no option to mix-and-match grants to create a third portfolio because there are numerous interconnected variables under consideration and inadequate time for staff to thoroughly analyze the implications of a new portfolio.

To remind listeners, at no point in the process has or will the Community Council receive identifying applicant information or discuss individual applications. After this meeting, staff will make public the applications in the recommended portfolio, and will send these funding recommendations to applicants and the Allocation Committee on March 7th. Applicants will have the opportunity to submit written, audio, or video testimony in support of their application by April 4th. On April 23rd the Allocation Committee will convene to make funding decisions. These funding decisions will be submitted to the City Council for approval in May.

Do you have any questions about the Community Council's role or the large grants process?

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## Conflicts of Interest Disclosure

- Council member, or immediate family member of Council member with financial relationship, or appearance of financial relationship with an applicant
- Financial relationship includes working for or contracting with an applicant organization
- Family members include spouse, domestic partner, child, sibling, or in-law

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**Meg speaking**

Briefly recap conflicts of interest policy for CC.

Council members with known conflicts of interest disclose them at this point in the meeting.

- Conflicts of interest refer to financial relationships between a council member or immediate family of a Council member
- Financial relationship includes being an employee  or a contractor of an applicant organization
- PCL has not disclosed the list of applicants to Council members; however if you work for an organization that you know has applied for PCL funding, or if a member of your family works for an organization you know has applied for funding, you need to disclose that conflict.
- If you volunteer for an organization you know has applied for PCL funding, you are not required to disclose that as a conflict.  You may disclose your connection if you choose.
- While the Council is not making recommendations on individual applications, you will be voting to prioritize applications with certain characteristics (program area for example). Declaring conflicts assures that your colleagues and the public are aware of council members affiliations with applicants, and supports the City's value of transparency.

# Two Portfolios Overview

- Approach to creating portfolios
- Data reminders and context on the overall applicant pool
- Portfolio comparison

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**Joel speaking (Introduces himself)**

We have 3 main sections to this part of the presentation. Council member received a pdf of this presentation, including our talking points, at the end of last week in preparation for this meeting. We are reviewing this information together to prepare you for your discussion and voting today, and for transparency with applicants and the public.

First we'll walk you through how PCL staff approached creating the 2 portfolios. We will provide this same background information to applicants on March 7 when we send them the recommendations of the chosen portfolio.
Next, we will offer you some key data reminders and important context to assist in your discussion and decision-making.

Finally, we'll walk you through the 2 portfolios. We want to emphasize now that they are quite similar. Shortly, you'll hear more about why that is. As we present about them, we'll focus on what's different or unique about each one.

# Approach to creating portfolios

- Application score
- Community Council priorities
- Past performance of current grants
- Proposed program design
  - Feasibility; priority populations to serve; cost of the program in context of size, type of activities, and scale
- Financial health of the organizations

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**Joel speaks**

Big picture: PCL staff created the portfolios by using the main factors you see on this slide.

1. Application score
2. Community council priorities- Please keep in mind the priorities did not mean PCL staff would recommend *ONLY* applications for funding that met your priorities. Staff used the priorities alongside other factors- as "priorities" not as "requirements."
3. Performance of current grants
4. Proposed program design. This includes feasibility of the program and its proposed activities, the populations the program proposed to serve, the size and scale of the proposed program, and cost of the program in the context of size, scale, and activities.
5. Financial health of the organizations based on financial statements and/or audits submitted with the application.

As part of this presentation, we will explain more how we used these factors.

## Review process and application score

- Recruited and trained 96 community volunteers as reviewers
- 90 completed review of 168 applications
- Application score= median of 4 reviewers
- Scores related to strength of organization and program design for racial equity, diversity, and inclusion and program's ability to deliver effective services for priority populations.

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**Joel speaks**
This slide offers reminders about the review and scoring process for the applications.

We recruited and trained 96 community volunteers with lived and professional experience in PCL's program areas and priority populations. This was 50% more reviewers than our last funding round in 2019.

Some reviewers withdrew due to unexpected family emergencies. 90 reviewers completed all the reviews, resulting in 4 reviewers reading and scoring each application. The final score on each application is the median of 4 reviewers' scores.

You may recall that Community Council's work over 3 meetings shaped the questions and scoring criteria that lift up racial equity, diversity, and inclusion in the application.

Based on that work, 70% of the total points in applications are highly focused on issues of racial equity, diversity, and inclusion, and the program's ability to deliver effective programming and services for priority populations.

In general, we prioritized score as we created the portfolios.

## Community Council priorities

Applications with following characteristics

1. **In general, after score:** Focused on serving BIPOC/PCL priority populations (8/9); from small organizations (5/9); focused on serving 1-2 specific BIPOC priority populations and/or other PCL priority populations (4/9)

2. If **scored above median, deprioritize**: from large organizations (6/9); serving general PCL priority populations with no specific focus (6/9); from current grantees for a program PCL doesn't currently fund (6/9)

3. If **scored below median, prioritize**: from organizations that don't currently receive PCL $ (5/9); from small organizations (5/9); focused on serving BIPOC/PCL priority populations (4/9); focused on serving 1-2 specific BIPOC priority populations and/or other PCL priority populations (4/9)

**Arika speaks**

As we discussed in January, using only score has shortcomings. For example, some applications score highly due to strong grant writing, but the proposed program may have performance challenges. Similarly, some applications score low due to lack of grant writing experience, though they may deliver effective programming and services.

You all reviewed various characteristics about the application pool and voted on 3 questions to express priorities for which applications to fund, in relationship to score. This slide outlines the priorities of a majority, or close to a majority, of Community Council members. Numbers in parentheses show number of council members that voted for a priority out of the total members voting.

At a high level, Council priorities are for applications: 1) that focus on serving Black and Indigenous children and families, and children and families of color along with a range of other priority populations such as LGBTQIA+, immigrant and refugee, and disability; 2) from small organizations or from organizations without PCL funding; 3) that focus on serving 1-2 specific racial/ethnic PCL priority populations and/or 1-2 other PCL priority populations. Council deprioritized applications: 1) from large organizations; 2) that serve general PCL priority populations with no specific focus population, and 3) from current grantee organizations for a program that PCL does not currently fund.

## Application Characteristics: Focus Population

- General PCL priority populations
- Focus on BIPOC children and families
- Specific focus populations

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**Arika speaks**
The next 3 slides are a reminder of the definitions for the application characteristics related to Council's priorities that we just reviewed.

This slide reviews application characteristics for focus population. Applicants answered questions about who they propose to serve and their expertise doing so. As a result, scores reflect the extent to which an organization and proposed service have strong culturally relevant (or specific) experience and success with the population to be served.

Staff analyzed application data and grouped applications 3 ways:
•*General population/multicultural:* these applications propose to serve all or most of PCL's priority populations.
•*BIPOC focus:* these applications propose to serve Black, Indigenous, and children of color and some other priority populations such as LGBTQ+ youth, youth with disabilities, and/or houseless families.
•*Specific focus:* these applications propose to serve 1-2 specific racial or ethnic priority populations and/or 1-2 other priority populations. 92% of these applications focus on serving at least 1 racial/ethnic priority population.

The groupings are not perfect or exact. Keep in mind all programs funded by PCL are open to all children, youth, and families.

# Application Characteristics: Size of Organization

- Small org (annual revenue under $6M)
- Medium org (annual revenue between $6 - $18M)
- Large org (annual revenue over $18M)

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**Arika speaks**

To be eligible for PCL large grants, organizations need annual revenues of at least $750,000.

Based on the distribution of applications by revenue, staff created the following groupings:
•small (annual revenues under $6M)
•medium (annual revenues between $6 - $18M)
•large (annual revenues over $18M).

**Application Characteristics:**
**Recent PCL Funding Status**

- Grantee organization, same program
- Grantee organization, different program
- Organization without PCL $

**Arika speaks**

This slide shows the application characteristics for whether the applicant currently receives PCL funding:

·Applications from *grantee organizations* for ongoing funding for the *same program.*
·Applications from *grantee organizations* for a *different program* not funded by PCL.
·Applications from *organizations currently without PCL $*. Many of these organizations requested funding to continue existing programming in their communities. Some requested funding to start new programming.

## Performance of current grants

- Program performance: past 2 years, current mid-year
- Key goals met or degree missed, such as number of participants to serve, amount of service to offer, how well participants attend programming, outcomes
- Spending

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**Brian speaks**

CL staff monitor all current grants for how well they reach their projected goals- numbers of children or families to serve; amount of service activities to be provided; if participants attend the program as much as grantees project, and how well participants achieve outcomes.

Using this approach, staff looks at annual performance of grants compared to their key goals. Given recovery from the pandemic, PCL staff focused its performance assessments on the program's past 2 years of FY23 and FY24 plus their midyear progress in the current FY25. Staff looked at types of goals met or missed each year, degree to which goals were missed, and whether a program is on track at mid-year to meet annual goals. Staff also looked at whether grant budgets were underspent and to what degree over the past 2 years and at mid-year.

Based on these assessments, the portfolios include continuing current grants with strong performance, reducing some grants considerably to focus on their most successful service components, or ending some grants entirely. While some recommendations reduce grants substantially due to variable performance, staff recommends continuing those grants that preserve access to services for specific PCL priority populations.

## Additional factors

- Feasibility of the proposed program: service activities, population to be served, scale of services, start-up issues
- Cost of service in context of scale and proposed activities
- Financial health of the organizations
- Priority populations: continue or add services
- Policy-specific issues in program areas

**Brian speaks**

As part of the application instructions that PCL published last fall for applicants, we listed the types of factors that staff uses to create funding recommendations.

Staff considered feasibility of the proposed program including:
- Understanding the service activities and their purpose
- Who the program proposes to serve and applicant experience with the population(s)
- Size/scale of the proposed program (for example, is it looking to quadruple in size?);
- Whether the program would be a start-up; PCL has consistently seen organizations struggle to start new programs, especially in the pandemic aftermath Staff looked at the cost and program budget in the context of the scale and type of proposed activities. Staff evaluated financial health of the organizations based on financial audits submitted and/or financial statements.

Staff considered which priority populations a program proposes to serve, including if it serves a population that PCL has historically underserved, such as Pacific Islanders.

Staff also considered policy issues specific to program areas to help determine which applications to recommend in the portfolios. For example, in early childhood we tried to focus its funding on applications providing services for infants/toddlers and away from preschool-age services (due to growth in Preschool for All). In mentoring, staff tried to include programs serving youth ages 18-24 as part of a shift in that program area's funding priorities .

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# Applicant pool context

Applicants requested more than 3 times the funding available.

| $ Requested in applications, 3-years | $222.9 Million |
|---|---|
| $ available from PCL, 3-years | $64.7 Million |

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**Brian speaks**
This slide demonstrates significant demand for PCL grants and resources.

In the current funding round, applicants requested $222.9 M over 3 years. PCL has $64.7 M available.  Their requests are more than 3 times the funding available.

# Applicant pool context

| Funding round metrics | 2019-20 | 2024-25 | % change |
|---|---|---|---|
| Number of Applications | 116 | 168 | 45% |
| Number of applications from organizations without PCL $ | 25 | 76 | 204% |

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**Brian speaks**

In the current funding round, PCL received 168 applications, which is a 45% increase compared to the last funding round in 2019. Of the total, 76 applications are from organizations without current PCL funding.  That is a 204% increase compared to 2019.

## Applicant pool context

| Current Annual Large Grants Budget Total (FY 25) | Projected Average Annual Resources (FY26-28) | % change (FY 26) |
|---|---|---|
| $27.2 million | $21.56 million | -21% |

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**Brian speaks**

Overall, PCL revenues are projected to decline over the next few years. Large grant budgets for the current fiscal year total $27.2 million. This is a combination of annual revenues generated by the Levy, and fund balance that accumulated from unspent funds in prior years. The average annual resources projected to be available for large grants over the next 3 fiscal years is $21.6 million per year.  That's a 21% decrease in available annual resources between the current fiscal year and the average annual resources over the next 3 years. This decline is due in part to lower projected revenue from property taxes, increased compression from other local-option levies, and the fact that we've already significantly spent down the previous fund balance.

As part of constructing the portfolios, PCL staff knew we had considerably lower resources available overall and much higher demand in applications.

In order to meet demand and address Council priorities, particularly for funding new programs, and also continue programs with positive performance and those providing key services to priority populations, we had to reduce funding for nearly all currently funded large grants. We weighed past performance and council priorities to inform to reductions. The average reduction for continuing programs was 26%. In addition, staff recommended some grants not continue.

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**Applicant pool context**

- Tensions between some Council priorities in applicant pool data
  - Size of organization, type of focus population served, and organizations with or without current PCL grants.

- Tensions between Council priorities and challenges in program service delivery
  - after school/mentoring applications vs. youth enrollment and participation

**Meg speaking**

In analyzing the data for this meeting, staff found tensions between some Council priorities. For example:

> 67% of applications from current grantee organizations focus on serving BIPOC or specific populations, compared to 59% of applications from organizations without PCL $.
> 37% of applications from small organizations serve general PCL priority populations (have no focus), compared to 25% of applications from large organizations.

Similarly, there were tensions in the overall applicant pool demand, Council priorities, and what staff have observed in program area sectors for the past few years. For example:
- After school and mentoring had the highest number of applications and the most applications from small organizations or organizations without current PCL $, but those 2 program areas had challenges with reaching full enrollment and having children/youth attend compared to other PCL program areas.

Staff considered the tensions between application demand, council priorities, and program feasibility as we created the 2 portfolios of recommended applications.

## Portfolios: allocations %

Both portfolios allocate funds slightly differently than the Allocation Committee outlined in June 2024.

| Program Area | Allocation Committee % | % total funding requested | Portfolio A % of funding | Portfolio B % of funding |
|---|---|---|---|---|
| Child abuse prev. interv. | 20-25% | 16% | 19% | 19% |
| Early childhood | 19-21% | 16% | 19% | 19% |
| After school | 16-19% | 23% | 17% | 18% |
| Hunger relief | 15-18% | 13% | 14% | 14% |
| Mentoring | 14-17% | 22% | 18% | 19% |
| Foster care | 12-13% | 11% | 12% | 11% |

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**Meg speaks**
The next several slides compare the 2 portfolio options of applications recommended for funding. As you will see, they are very similar. This is because of how we applied all the factors we just explained to you, including Council's priorities. As I review these slides, I will focus on what is different or unique about each portfolio.

You may recall that at the Allocation Committee's June 2024 meeting, they allocated ranges of funding to each of PCL's program areas for the large grants funding process. Those ranges were based on their policy priorities and historical trends for funding demand in those program areas.

At your January meeting, council members also expressed the desire for staff to create portfolios with a balance of investments across program areas as aligned with allocations previously set by the Allocation Committee. This slide reminds you of the ranges the Allocation Committee set for percentage of funds available to allocate to each program area. It also reminds you of the percentage of total dollars requested by applicants among the 6 program areas. You can use that context to compare the 2 portfolios and how they allocate available resources.

Both portfolios allocate funds slightly differently than the Allocation Committee outlined in June 2024. In both portfolios, mentoring is allocated over the high end of the range and child abuse prevention/intervention is allocated under the low end of the range. These approaches help address relative demand in these program areas and council priorities for new programs and small organizations, which are concentrated in mentoring and after school program areas. Portfolio B also allocates more to after school and mentoring, and less to foster care for these same reasons- addressing demand in the applicant pool and council priorities.
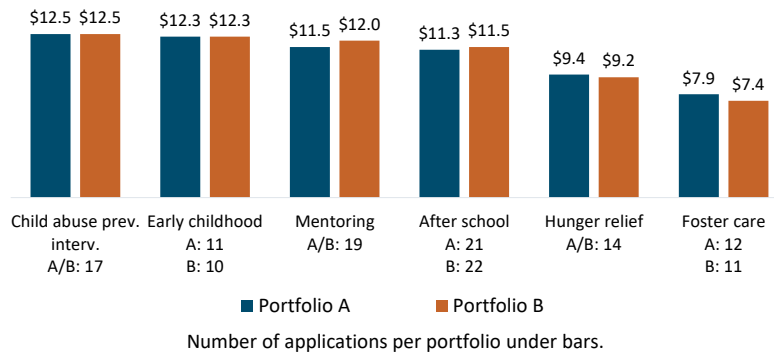
**Speaker Meg**

This graph compares the 2 portfolios by how the dollars are allocated, the amounts behind the percentages on the previous slide. Portfolio A is the blue bars and Portfolio B is the orange/red bars.

Total allocations for both portfolios for both portfolios are $64.9 million over 3 years. We had a grant that chose to end December 31 and did not spend its remaining 6 months of funding.

**Portfolio A has a total of 94 grants.**
It has more funding for foster care and hunger relief compared to portfolio B.

**Portfolio B has 93 grants.**
It has more funding for mentoring and after school compared to portfolio A.

These differences between them include 3 grants in A that are not in B, and 2 grants in B that are not in A.
Other differences include some after school grants having higher funding levels in A and some mentoring grants having higher funding levels in B.

## Portfolios: program area

Portfolio A has 1 more application than Portfolio B, and the number of applications recommended varies in 3 program areas.

| Program Area | Total Applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| After school | 45 | 21 | 22 |
| Child abuse prev. interv. | 24 | 17 | 17 |
| Early childhood | 19 | 11 | 10 |
| Foster care | 18 | 12 | 11 |
| Hunger relief | 23 | 14 | 14 |
| Mentoring | 39 | 19 | 19 |

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**Meg speaking**

This slide shows the total applications received in each program area, and the number recommended in each portfolio.

Light blue shading shows where one portfolio is less that the other. Dark blue shading shows where the portfolio is more than the other.

A has 94 total grants and B has 93.

A has more grants in early childhood and foster care.
B has more in after school.

## Portfolios: median score

Majority of applications recommended scored above median.
A has more above median, and B has more below.

| Score status | Total Applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| above median in program area | 91 | 69 | 67 |
| below median in program area | 77 | 25 | 26 |

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**Meg speaking**

This slide shows the number of applications that are above and below the median score in their program area, and the number recommended in each portfolio.

A has 2 more applications above median score than B.
Overall, 73% of the applications in portfolio A scored median or higher.

B has 1 more application below median score than A.
Overall, 72% of the applications in portfolio B scored median or higher.

You may recall from the presentation in January that small organizations and organizations without current PCL funding tended to have lower median scores while larger organizations and organizations with current PCL funding tended to have higher median scores. As such, those lower scoring applications tend to be clustered in after school and mentoring program areas.

# Portfolios:
# Council priority/population focus

A has 1 more application serving general priority populations.

| Application characteristic | Total Applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| specific population focus | 64 | 39 | 39 |
| BIPOC+ other priority pops | 43 | 28 | 28 |
| general priority pops | 61 | 27 | 26 |

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**Meg speaking**

This slide shows the number of applications grouped by the type of population focus they proposed. Remember that specific focus means they proposed to serve 1- 2 racial/ethnic priority populations and/or 1-2 other priority populations (such as disability or LGBTQ+). BIPOC+ other priority populations means the application proposes to focus on BIPOC populations and 1 or more other priority populations. General priority populations means the program did not indicate a specific focus.

A has 1 more application serving the general priority populations.

## Portfolios:
## Council priority/organization size

A has two more applications from medium organizations.

B has one more application from small organizations.

| Application characteristic | Total Applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| Small organizations | 73 | 33 | 34 |
| Medium organizations | 44 | 26 | 24 |
| Large organizations | 51 | 35 | 35 |

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**Meg speaking**

This slide shows the number of applications grouped by size of the organization. These definitions are based on annual organization revenue. Small organizations

A has 2 more applications from a medium sized organizations.

B has 1 more application from a small organization.

*CORRECTION 3/5/25: During the Community Council meeting on March 3, 2025, this slide contained an error. The total number of applications from small organizations and large organizations was transposed on the slide. Error stated 51 applications from small organizations, and 73 from large. The accurate data are on this corrected slide.*

## Portfolios:
## Council priority/recent PCL $

A has 2 more applications from grantee organizations for a different program that PCL does not currently fund.

B has 1 more application from an organization without current PCL funding.

| Application characteristic | Total Applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| Grantee org- same prog | 74 | 61 | 61 |
| Grantee org- diff prog | 18 | 6 | 4 |
| Organizations no PCL $ | 76 | 27 | 28 |

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**Meg speaking**

This slide shows the number of applications grouped by whether the organization has a current PCL grant or not.

A has 2 more applications for current grantee organizations requesting funding for a different program than PCL currently funds.

B has 1 more application for an organization that does not currently receive PCL funding.

## Portfolios: Priority populations

Small differences in which applications are recommended impacts the differences between portfolios.

| PCL Priority Populations | All applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| American Indian/Alaska Native | 84 | 41 | 39 |
| Asian/SE Asian | 90 | 47 | 45 |
| Black/African American | 125 | 69 | 69 |
| Latine | 117 | 63 | 62 |
| Pacific Islander/Native Hawaiian | 82 | 44 | 42 |
| African | 129 | 73 | 73 |
| Middle Eastern | 69 | 35 | 34 |
| Slavic | 64 | 33 | 32 |
| White | 82 | 44 | 43 |

**Meg speaking**

This slide shows the number of applications that proposed to focus their services on each racial and ethnic population, including PCL priority populations.

Small differences in which applications are recommended in each portfolio creates the differences in the table.

A has 3 applications not included in A.
B has 2 applications not included in B.

The rest of the applications are the same. Overall, the differences between A and B are minimal.

# Portfolios: Priority populations

Small differences in which applications are recommended impacts the differences between portfolios.

| PCL Priority Populations | All applications 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| Immigrant/Refugee | 107 | 57 | 55 |
| Disability | 100 | 54 | 51 |
| LGBTQ+ | 95 | 51 | 49 |
| Single Parent | 82 | 51 | 50 |
| Teen Parent | 55 | 35 | 34 |
| houseless | 86 | 51 | 50 |

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**Meg speaking**

This slide shows the number of applications that proposed to focus their services on PCL's other priority populations.

As in the previous slide, the same small differences in which applications are recommended in each portfolio creates the differences in the table.

# Portfolios: funding priorities

- In after school, mentoring, foster care, and child abuse prevention/intervention, most applications addressed most or all funding priorities.
- In early childhood and hunger relief, which had fewer applications overall, each funding priority had at least 7 applications (or more) that addressed it.
- As a result, both portfolios address all funding priorities in each program area.

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**Meg speaking**

You may recall that in all program areas, applications submitted covered the funding priorities well. [READ SLIDE]

There are only differences in after school, early childhood, and foster care because those program areas have a different number of grants in portfolio A compared to B.

It changes the number of applications addressing a funding priority by 1. For example, in early childhood, 11 applications in portfolio A address the priority of supporting children with disabilities, compared to 10 applications recommended in portfolio B.

**Council Process**

1. Initial poll
2. 3 rounds of pair work (14 min/pair, 45 min total)
3. Break (10 min)
4. Large group discussion (45 min)
5. Solo reflection (10 min)
6. Official vote

**Katrina speaking**

We'll spend the remainder of this meeting in group work discussing the two different portfolio options.

We'll start with an initial poll to identify the Community Council's thinking before discussion. For the poll, we ask which portfolio you are leaning towards recommending, and you will have the option to select Portfolio A, Portfolio B, or undecided.

**Katrina speaking**

After the initial poll we'll spend 45 minutes doing pair work. You'll have 14 minutes/pair and you'll rotate through 3 rounds. In each pairing, one council member will share what portfolio they are leaning towards and why, or if they're undecided, the considerations they're weighing. During this time the other council member listens and asks questions. You will have 7 minutes before switching roles so that each person in each pair has both the opportunity to listen and to share. (If have odd number of council members, instructions for group of 3 below)

When you are in the speaking role, I want you to share which portfolio you are leaning toward supporting and why. Or, if you are undecided, share the considerations you're weighing.

When you are in the listening role, listen deeply, check your assumptions, put aside your judgement, and ask questions to understand why your fellow council member holds the perspective they do. Refrain from responding to them. Example follow up questions include:
- ☐ What I'm hearing you say is _____. Did I hear you correctly?
- ☐ Can you tell me more about _____?
- ☐ Why _____?
- ☐ I don't understand _____. Can you explain it in a different way?
- ☐ When you prioritize/say _____, I assume _____. Is my assumption accurate? If not, can you tell me more?

We'll have these roles and example questions up on the screen for you to reference during pair work.

# Council Process

1. Initial poll
2. 3 rounds of pair work (14 min/pair, 45 min total)
3. Break (10 min)
4. Large group discussion (45 min)
5. Solo reflection (10 min)
6. Official vote

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**Katrina speaking**

After pair work we'll take a break and then reconvene for 30 - 45 minutes of large group discussion on what surfaced during pair work. From large group discussion we'll move to 10 minutes of quiet solo reflection during which you can add any final thoughts to a zoom whiteboard, do some solo journaling, take a walk, go to the bathroom, get more food, or do whatever else would be helpful to gather your thoughts before closing with the vote.

We'll end with the official vote where we ask which portfolio you recommend to the Allocation Committee for funding. You will be able to select 1 of 2 options: Portfolio A or Portfolio B. Whichever portfolio receives a majority of the votes will be recommended to the Allocation Committee for funding.

Any questions about the process before we take our initial poll?

# Pair Instructions
### 7 min in each role

- Speaking role: share portfolio you are leaning towards and why; if undecided, share considerations you are weighing

- Listening role: listen deeply, check your assumptions, ask questions to understand, refrain from responding
  - Can you tell me more about _____?
  - Why _____?
  - When you prioritize/say _____, I assume _____. Is my assumption accurate? If not, can you tell me more?

portland
children's
levy

Pair 1: 14 min (7 min time call, 5/5 min time calls if group of 3)
Pair 2: 14 min (7 min time call, 5/5 min time calls if group of 3)
Pair 3: 14 min (7 min time call, 5/5 min time calls if group of 3)

**Closing & Next Steps**

- Staff sends funding recommendations to applicants and the Allocation Committee
- April 23$^{rd}$: Allocation Committee convenes to make funding decisions
- Small grants work up next; timeline and next meeting TBD – Katrina will be in touch
- Evaluation & stipend invoice

**Meg speaking**

**What is coming up?**
Staff will make public the applications in the recommended portfolio, and will send these funding recommendations to applicants and the Allocation Committee on March 7th. Applicants will have the option to submit written, audio, or video testimony in support of their application by April 4th.  On April 23rd the Allocation Committee will convene to make funding decisions. These funding decisions will be submitted to the City Council for approval in May.

Depending on how the agenda for the Allocation Committee develops, Katrina might reach out to council members without conflicts of interest to share about the Council discussion to the Allocation Committee at the April 23rd meeting.

Big picture, small grants work is up next; the timeline and next meeting are TBD – Katrina will be in touch to schedule the next meeting.

**Before you leave**
- ☐ Evaluation: https://forms.office.com/g/gXCpYmhdAs
- ☐ Stipend invoice
- ☐ Make sure to give Katrina both the evaluation and stipend invoice before you depart

**Gratitude** for everyone's time

# PORTFOLIO COMPARISONS

**Funding allocations**

| Funding allocations | Allocation Committee ranges | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| After school | 10- 11.9 | 11,307,000 | 11,457,000 |
| Child abuse prev. interv. | 12.6 - 15.1 | 12,492,000 | 12,492,000 |
| Early childhood | 11.9 - 13.2 | 12,303,000 | 12,303,000 |
| Foster care | 7.5 - 8.2 | 7,968,000 | 7,429,000 |
| Hunger relief | 9.4- 11.3 | 9,400,000 | 9,237,000 |
| Mentoring | 8.8- 10.7 | 11,508,000 | 12,060,000 |
| | | 64,978,000 | 64,978,000 |

**Program area**

| | All apps 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| After school | 45 | 21 | 22 |
| Child abuse prev. interv. | 24 | 17 | 17 |
| Early childhood | 19 | 11 | 10 |
| Foster care | 18 | 12 | 11 |
| Hunger relief | 23 | 14 | 14 |
| Mentoring | 39 | 19 | 19 |

**Median score**

| | All apps 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| above median in program area | 91 | 69 | 67 |
| below median in program area | 77 | 25 | 26 |

**Council priority/Size of organization**

| | All apps 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| Small organizations | 73 | 33 | 34 |
| Med-size organizations | 44 | 26 | 24 |
| Large organizations | 51 | 35 | 35 |

**Council priority/Recent PCL funding status**

| | All apps 168 | Portfolio A 94 | Portfolio B 93 |
|---|---|---|---|
| Grantee org- same prog | 74 | 61 | 61 |
| Grantee org- diff prog | 18 | 6 | 4 |
| Org without current PCL $ | 76 | 27 | 28 |

# PORTFOLIO COMPARISONS

**Council priority/Focus population**

|  | All apps | Portfolio A | Portfolio B |
|---|---|---|---|
|  | 168 | 94 | 93 |
| specific focus populations | 64 | 39 | 39 |
| BIPOC+ other priority pops | 43 | 28 | 28 |
| general priority populations | 61 | 27 | 26 |

**Number applications proposing to focus on each population**

|  | All apps | Portfolio A | Portfolio B |
|---|---|---|---|
|  | 168 | 94 | 93 |
| American Indian/Alaska Native | 84 | 41 | 39 |
| Asian/SE Asian | 90 | 47 | 45 |
| Black/African American | 125 | 69 | 69 |
| Latine | 117 | 63 | 62 |
| Pacific Islander/Native Hawaiian | 82 | 44 | 42 |
| African | 129 | 73 | 73 |
| Middle Eastern | 69 | 35 | 34 |
| Slavic | 64 | 33 | 32 |
| White | 82 | 44 | 43 |
| Immigrant/Refugee | 107 | 57 | 55 |
| Disability | 100 | 54 | 51 |
| LGBTQ+ | 95 | 51 | 49 |
| Single Parent | 82 | 51 | 50 |
| Teen Parent | 55 | 35 | 34 |
| houseless | 86 | 51 | 50 |

CORRECTION 3/5/25: During the Community Council meeting on March 3, 2025, this hand-out contained an error. The total number of applications from small organizations and large organizations was transposed in the table. Error stated 51 applications from small organizations, and 73 from large. The accurate data are on this corrected in this version.

# PORTFOLIO COMPARISONS

**APPENDIX: Portfolio comparisons for funding priorities. Number of applications addressing priority.**

| PRIORITIES | Total apps | Portfolio A | Portfolio B |
|---|---|---|---|
| **After School** | | | |
| Activities (arts, sports, STEM, recreation) | 43 | 19 | 20 |
| Hard/soft skills, career readiness, interships | 31 | 16 | 17 |
| Academic support (tutoring, homework help) | 26 | 14 | 15 |
| Healthy social emotional development (relationships, manage stress/conflict) | 44 | 21 | 22 |
| Activities for youth with disabilities, delays, neurodivergence | 36 | 17 | 17 |
| **Child Abuse Prev Interv** | | | |
| Connect families to resources (e.g food, utility/housing assistance) | 24 | 17 | 17 |
| Connect parents/caregivers, reduce isolation | 22 | 16 | 16 |
| Support parents/caregivers experiencing grief and stress | 22 | 16 | 16 |
| Help families navigate systems (e.g. child welfar, behavioral health) | 23 | 16 | 16 |
| Support healing of families impacted by violence | 20 | 14 | 14 |
| Support and resources to teen parents | 13 | 8 | 8 |
| **Early Childhood** | | | |
| Help families learn about child behavior, development | 17 | 10 | 9 |
| Help children identify feelings | 18 | 11 | 10 |
| Help parents and caregivers of children with disabilities, delays | 17 | 11 | 10 |
| Offer community-based pre/postnatal maternal education | 10 | 8 | 8 |
| **Foster Care** | | | |
| Support for older youth to enter college, workforce, live on their own | 13 | 9 | 9 |
| Support for foster youth to understand their cultural, racial identity | 14 | 9 | 8 |
| Support for connect/reunification between foster youth/birth families | 12 | 8 | 7 |
| Support for foster parents to support youth who identify as LGBTQ+ | 7 | 6 | 5 |
| Help foster youth/families navigate multiple systems, especially behavioral health | 13 | 9 | 8 |
| Provide services to support mental health of foster youth who identify as LGBTQ+ | 10 | 9 | 8 |
| Mentoring for foster youth and/or birth families | 10 | 7 | 6 |
| **Hunger Relief** | | | |
| Food pantries at community based locations | 14 | 9 | 9 |
| Food pantries at schools | 9 | 7 | 7 |
| Free grocerices/ready-to-eat meals delivered to families' homes | 17 | 11 | 11 |
| Classes for children/families on nutrition, cooking, gardening | 17 | 10 | 10 |
| Access to gardens for families to grow food | 7 | 4 | 4 |
| **Mentoring** | | | |
| Activities for social connections, reduce isolation, affirm youth identities | 39 | 19 | 19 |
| Support youth 14-24 to find/complete apprenticeshisp, find jobs, go to college | 34 | 17 | 17 |
| Identity-specific support for youth to express feelings, heal from trauma | 34 | 18 | 18 |
| Prevent youth from joining gangs, reduce gang involvement | 28 | 15 | 15 |
| Affirm cultural, racial, gender, LGBTQ+ identities of youth and families | 38 | 19 | 19 |
| Help youth develop leadership skills | 38 | 18 | 18 |