



# Grantmaking Recommendations Report to City of Bainbridge Island

## 2017-18 Human Services Fund Program

**Submitted by:**

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# I. INTRODUCTION

## A. Project Management

In September 2016, The Giving Practice (consulting arm of Philanthropy Northwest) was selected by the City of Bainbridge Island (“City”) to administer and facilitate the grantmaking process for the Human Services Fund (HSF) program.

The Giving Practice (TGP) committed to a scope of work that included, at a high level, the following over a two-year timeframe:

### Fall 2016

- Updating the Request for Proposals (RFP) (edits and adjustments to the prior year RFP)
- Leading an orientation with citizen review committee (Human Services Fund Advisory Committee or HSFAC) about general best practices/approaches to reviewing and analyzing proposals, and the City’s funding process specifically
- Facilitating review discussions with HSFAC members
- Providing proposal feedback to applicants, compiling responses in advance of applicant presentations
- Facilitating funding recommendation meeting with HSFAC leading to fund recommendations to City Council
- Serving as primary point of contact for both review panel and applicants with respect to proposal-related questions and process.

### Ongoing – 2017 Activities

- Review interim quarterly and Annual Progress Reports for grantees selected.
- Provide a summary report of progress to date, noting trends, and learning opportunities

### Ongoing - 2018 Activities

- Review Final Grant Reports
- Provide a summary report of successes, noting trends, and learning opportunities

## B. Program Changes in 2016

Generally, the HSFAC review process followed the process used in the previous year (2015). Two differences to highlight were:

- 1) In 2016, the City Council determined to shift the City’s funding to a two-year cycle in order to reduce administrative burdens on, and increase financial stability for, funding recipients. This program change meant that HSFAC would be providing a recommendation for **two years** of funding: 2017 & 2018. This change resulted in the HSFAC considering a funding recommendation for a total of \$660,000. It is a significant effort and represents a critical opportunity for local human

service organizations. As a point of reference, this funding represents approximately 3% of the City's entire General Fund, and demonstrates the high level of support that the City provides to the community's human service providers.

- 2) Also in 2016, the City contracted with PRR, Inc. to complete an updated community needs assessment, which provides a comprehensive review of the current human services needs and opportunities on Bainbridge Island. The [2016 Community Needs Assessment Report](#) was presented to the City Council in October. Fund applicants were encouraged to review/reference the needs assessment as one part of preparing their statement of need. The HSFAC members were encouraged to review the report and use the findings to inform their evaluation of funding proposals. To assist that effort, PRR provided a [presentation](#) directly to the HSFAC to review findings and to allow questions in a small group format in preparation for review of project proposals.

## II. RECOMMENDATIONS FOR FUTURE CYCLES

This section provides feedback and recommendations through each of the grantmaking stages from the citizen reviewer experience to that of the applicant (RFP, application, review period, and funding decisions). In December 2016, TGP sent out two surveys (via Survey Monkey) with each customized to two different sets of respondents: the advisory committee members (83% response rate) and the applicants (61% response rate). All responses were anonymous. See **Appendix** for survey questions.

### A. Advisory Committee Experience

#### HSFAC Member Selection and Scheduling Process

In August, 2016, the City had appointed seven residents of Bainbridge Island to serve on the advisory panel. The panel members represented diversity in their experiences, professions, and perspectives. Two of the members had served on the panel the previous cycle (2016) and the combination of new and experienced reviewers worked well.

Once advisory members were appointed, the City worked to identify members' availability and set meeting dates for the committee that were compatible with all HSFAC members' schedules. This is an important and challenging component of the process, since the committee's work is compressed into September - December. The 2016 committee schedule is included in the Appendix for reference purposes.

In early October, one member of the committee resigned due to conflicts with her professional commitments. Another member missed three meetings, including the Presentation Meeting when all applicants were allotted ten minutes to present their proposal and respond to committee questions. That participant and City decided it was best for the member to step down due to not having participated in the review discussion meetings and hearing the applicants present their requests.

It is important for the City to do whatever is feasible to help retain committee members throughout the HSFAC process. During the appointment interview, candidates are told about the meeting expectations and the timing of the committee's work during the Fall months. Given the issues with two members in this year's

cycle, it will be important to continue to emphasize this information, perhaps more explicitly, in the communication with potential members.

## HSFAC Members Feedback

A survey was conducted following the last HSFAC meeting and advisory members were invited to provide their input to five questions. Five respondents submitted their feedback via Survey Monkey, which ensures all responses are anonymous.

The first question for the advisory team addresses the initial process for a Bainbridge resident to apply for a seat on the Advisory Committee, followed by questions about the orientation and review process. The last question was open-ended and those comments are presented alongside each of the themes below.

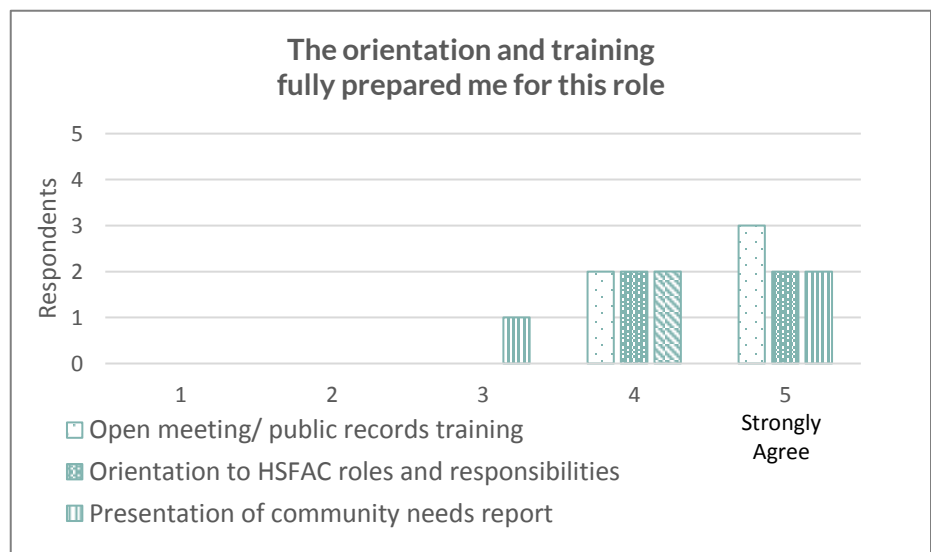


*"I felt it was an excellent process. Extremely well organized."*

*"When we applied it wasn't clear exactly what we would be doing or what the schedule would be yet."*

### Question 2:

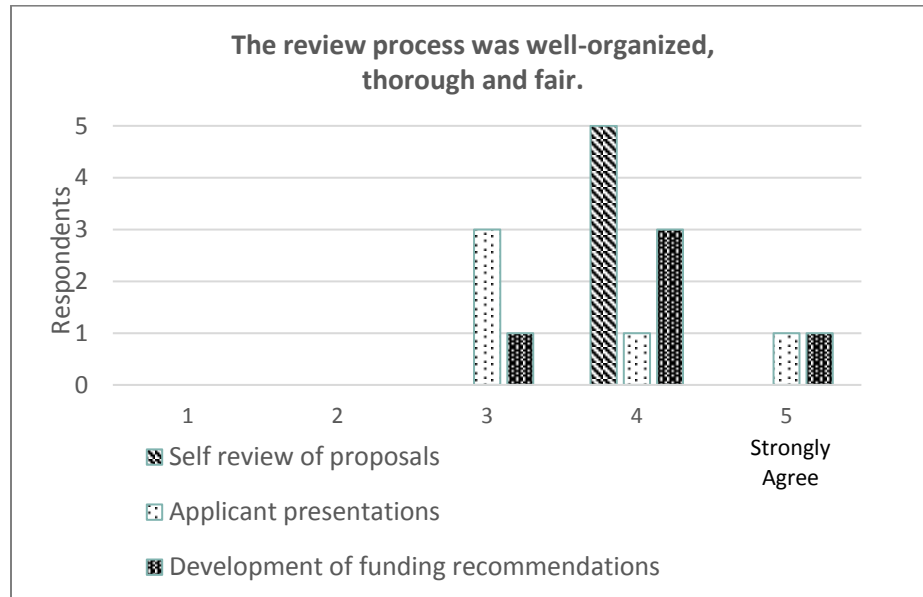
*"The training was very straightforward. Maybe some more examples.....of OK and NOT OK. But I thought it was fine."*



Comments were constructive in ways the Needs Assessment presentation could have been improved:

- “The written materials for the needs report and the oral presentation seemed a bit disconnected. I think if the written materials had been a bit tighter: more in an outline format, or maybe in some sort of graphic, it would have been helpful.”
- “I think the needs assessment meeting could have been shorter. While the needs assessment grounds the process, I think that it took up a disproportionate amount of the total time spent on the effort. Maybe adding it as a shorter presentation to the first meeting would have sufficed.”

Question 3:



- “All of these were well-organized and as fair as possible, given the circumstances. The downfall was thoroughness: we could have used a bit more time, especially between presentations and our recommendation meeting. But overall, I think it was an amazingly balanced process. (I also missed the meeting where we developed questions for the applicants, and I think that may have influenced my view of the thoroughness of our efforts.)”
- “I think that applicants should be provided more guidance regarding what's expected during the presentations. I think several applicants misjudged what the review committee was looking for. I think it would be good to reinforce that the committee has a pretty specific set of criteria by which they made decisions and that being responsive to these criteria and the associated questions is the best use of the brief presentation time.”
- “I thought some of the presentations were nonsense, perhaps there needs to be some verbiage about what is expected in the 5 minutes”
- “The templates for rating/scoring were very helpful. Open minded committee members are a good thing too!”
- “My one thing would be to lengthen the process a bit so we have a bit more time between submission of the requests and the first meeting to discuss, I felt kind of rushed this year.”

Committee members also provided comments about the RFP guidelines and expectations that factor into the review and recommendation process:

- "I think the city should consider ways to further leverage COBI dollars. One option is to require applicants to secure matching funds from other sources (real dollars, not in-kind). This would expand the reach of services the city prioritizes. It may also help local organizations with their fundraising – if they go to a funder asking for \$50K and the say it will be matched by COBI it may end up bringing more overall human services dollars to the island."
- "I think the wording of the questions [in funding application] leaves something to be desired about specificity, and much room to bloviate and extol the virtues of the program. The latter is moot in most respects as they are all good programs idealistically. I would like to see more specific questions about how this funding will actually benefit our target demographic, and really what happens if you don't get what you ask for."

Question 4:



- "I can't imagine how we could have carried out our mission successfully, let alone within the time allowed, without the planning and facilitation of Leslie and her cohorts. She was an incredible listener and problem solver. She dealt with logistical problems so gracefully that one would think she had a magic wand! In meetings she was able to facilitate full discussions, but also help us to use our time effectively. I really can't say enough in praise of her skills. I mentioned at the last meeting that I was very leery of having professional facilitation. Usually, I've experienced that to be more of a hindrance than a help. In this case, Leslie made me a super-believer!"
- "Our councilmember Michael Scott was efficient, fair, welcoming, and helpful throughout the process. It was a pleasure to work with him."
- "I'd suggest a more consolidated information delivery approach, especially during the applicant Q and A stage. There is a lot of information being thrown at the review committee, and consolidating this information (e.g., single file/PDF) would have made review much easier."
- "Scott was great again, very happy to work with him again."
- It was unclear who our leader was, and who was "in charge".

## B. Applicant Experience

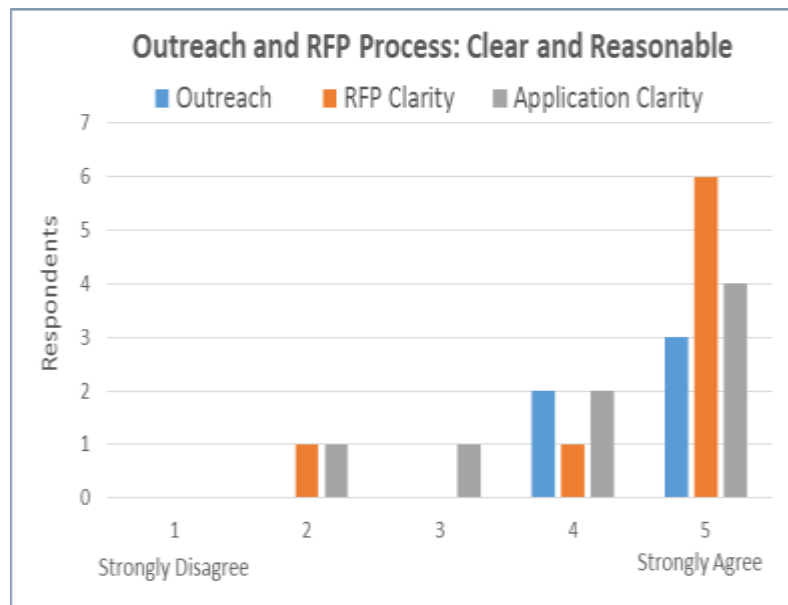
### Request for Proposals /Application

The prior RFP was the basis for drafting the current RFP with updates and revisions to include the changes outlined earlier (see Page 1). Other non-substantive edits were made to the application questions, cover page, and budget. Following the City’s distribution of the RFP to prior applicants and grantees, and posting to its website, an open RFP meeting was held for prospective applicants to meet with TGP and Chairman Mike Scott to ask questions and to walk through the application instructions. Roughly 15 applicants attended. TGP took note of every question and posted a [Frequently Asked Questions](#) list (with answers) to the City’s website.

In order to capture input from the applicants about their experience with the Human Services Funding process, a five-question survey was sent out to all applicants in December 2016 via Survey Monkey (all responses anonymous). Response rate was 60% (n=8) and what follows are the charts illustrating the responses to four questions, as well as comments relevant to each question and the open-ended 5<sup>th</sup> question asking for general comments.

#### Question 1: The Outreach and RFP process was clear and reasonable in communicating the process and expectations.

- *“The ongoing outreach and communications with the agencies was excellent.”*
- *“There was good coverage for reaching possible applicants and the size of the application was manageable and appropriate for the funding available.”*
- *“Having responses on the City website is a good idea. This could also extend to any questions that any applicants have as they move through the process.”*
- *“There was enough time allowed to complete the application.”*



This question included one suggestion for improvement:

*“It was a little unclear about the most recently completed budget line on the cover sheet for the proposal.”*



**Question 2: “We felt prepared for the presentation and had a clear understanding of what to expect.”**



- “The scheduling opportunity was clear and receiving questions before the presentation was helpful.”
- “Questions about items in the RFP were shared ahead of time.”

- “Scheduling was flexible; answering prepared questions ahead of time reduced anxiety.”

“Improvements (collected from one respondent):

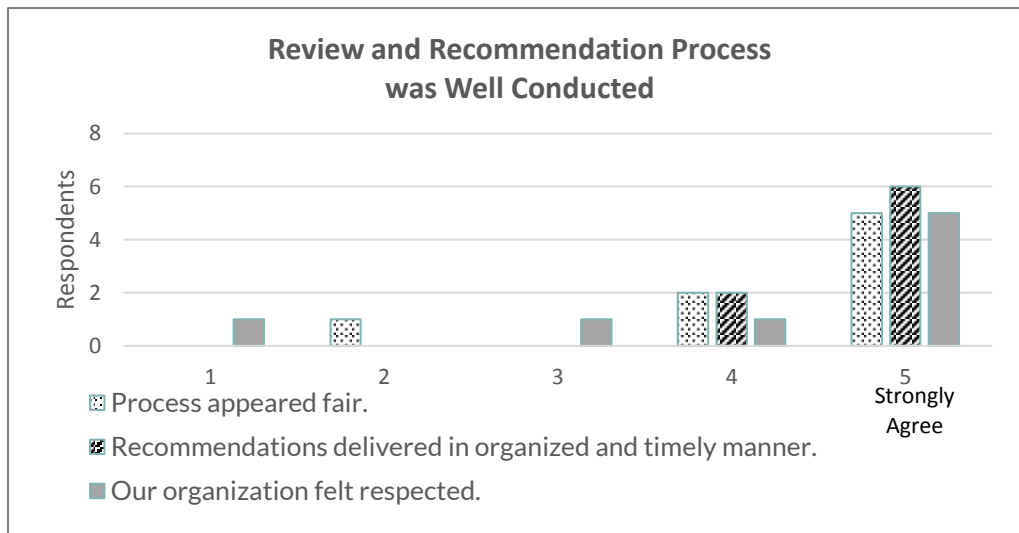
- Have extra copies at the ready for committee members if the documents do not get to their destinations. See above, instead of reducing anxiety, this upped the anxiety of both committee members and applicants at the presentations.
  - All applicants should present their requests for funding orally.
  - Keep reviewers on the same level as applicants, please, no use of the dais. You can arrange tables in the council room so there is enough room for all participants. What’s the message?
  - Applicants, public and committee should have list of presentation times several days before the interviews, rather than at time of arrival at city hall. Names of presenters are extraneous and can change before the actual presentation.
  - Before the oral presentation, help all the committee members understand how to read each agency budget and what it means in context of the request. It was obvious that two of the six members lacked understanding of fairly simple agency budgeting strategies that were clearly outlined in the application. One of them denied there even was a project budget included in the application and declared our request as a “misapplication” until several members pointed to the project budget within the application. A standard budget format for all agencies will help.
  - Committee members should have at least one other question in mind to ask instead of asking each other at the review/evaluation table where their fellow members can only speculate (incorrectly in almost all cases) about the missing information.”
- “I did not feel that the tentative date for panel meeting with communicated well (outside of those attending the information meeting) and we were not explained the timing of the presentation portion vs questions (which all in all are way too short).”
  - “I appreciated holding the interviews in council chambers. It felt less crowded from a presenter’s perspective.”

- *“Although our organization did not receive any questions prior to the presentation, I feel this is helpful to have them ahead of time so they can be addressed thoughtfully by the applicants. I also appreciate that the committee kept to the time frame very well during the presentations. It might be helpful, especially for new organizations, to give some guidelines about what would be most helpful for the committee to hear during these presentations.”*

## Review and Decision Process

This stage included a full panel review and discussion of the proposals that led to a set of questions reviewers had for each applicant. These questions (generally no more than five per applicant and often as few as one or two) were sent to applicants in advance of the presentations meeting. The presentations meeting was the opportunity for applicants to spend an allocated amount of time to both ‘pitch’ their proposal and address questions (not to exceed ten minutes). Most applicants chose to address the pre-meeting questions by email before the presentations meeting so that they would have more presentation time to address new questions or add more information about their proposal. Below is the survey feedback about this experience—both the review and decisions process.

### Question 3: “Our organization felt the review and recommendations process was well conducted.”



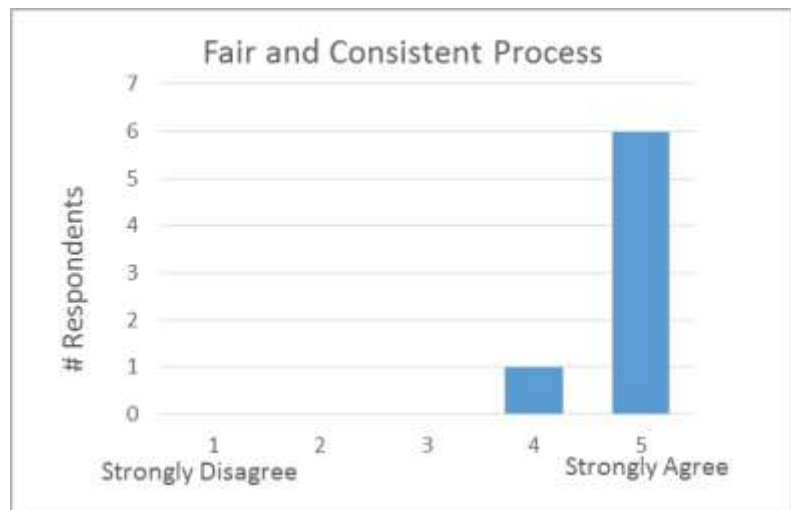
- *“The individuals listening to the presentation were encouraging and interested. I would have liked them to introduce themselves. The name plates were small!”*
- *“This year’s conversations and negotiations were much improved over last year’s, with much more conversation, opinions voiced and negotiations conducted.”*

#### Improvements (from one respondent):

- *Encourage more applicants to attend. Since I was the only one last year and this year to witness Council leadership and committee facilitation in making funding recommendations, this question really only applies to me. My colleagues have no experience in order to come to any valid conclusions and can only make assumptions.*

- One committee member, Susan Buckles, threw serious shade on Helpline, stating that, “I (she) was almost insulted that Helpline applied for food when it should have applied for social services or front desk, etc.” She went on to say that the committee was being “held hostage” because Helpline requested funding for food. She also stated that Helpline had a “misapplication” because she insisted there was no project budget. When she was directed to the project budget in the application in front of her, she said the amount was “ridiculous” and Mike Scott cited that in-kind donations were included in the total amount/value of the service. She repeatedly demanded that Helpline not be allowed to apply for food in future cycles until Mr. Scott said that was not in the group’s purview to control. This was not respectful or helpful to anyone sitting at the table. “
- “Our application was misplaced and that left us “out of the loop” -we know it happens, we are all human. And, it made for a bit of chaos on our organization’s end.”
- “I thought this was an incredibly well organized and fair process. The simple fact is that there are a lot of great organizations doing great work that deserve support - but there simply isn’t enough to go around. We really appreciate the allocation we received and look forward to continued service on Bainbridge.”
- “I felt like we were notified very quickly after the committee had made their recommendations. Considering the amount of money to be allocated and the requests for funding, I think the committee did an amazing job!”

**Question 4: “Council leadership and committee facilitation successfully demonstrated a fair and consistent process in making funding recommendations.”**



- "I really have no knowledge of this - did the council have a role this other than final approval? I did not attend any of the committee meetings so I have no knowledge of their process."
- "Let me express my thanks for soliciting feedback from the “other partner” in this business relationship. Mike Scott has done an admirable job keeping it more “principle than personality” based. Leslie did a good job with the constraints and lack of concise criteria that was hers to work with. Several information glitches marred a smooth process, but these will be worked out in the next cycle.
  - Include City staff in in this evaluation segment next cycle.
  - You may consider that any committee member who has had a significant past conflict or been asked to leave from an applicant agency recuse themselves from evaluating that agency.

- *A good amount of committee time was spent on an application that had no non-profit status or 990. This application should not have made it to the committee's workload.*
- *I know the City has been interested and working toward transparency in conducting business on behalf of its constituents. Posting an application for \$150,000 request two weeks after the due date with no explanation to other applicants, the committee or the public only tends to obscure fairness and consistency. Everyone appreciates an honest apology for any honest mistake, followed up with verification of authenticity. What's the message? "*
- *"The process appeared to go very smoothly to me. I appreciate that the process was open to the public for complete transparency."*

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## C. Check List for Future Cycles: Recommendations to Consider

### Advisory Committee

- To ensure the City has a pool of reviewers to choose from, maintain a spreadsheet of prospective reviewers that runs continuously and updated as people express interest or are proactively identified by City employees. The list should include name, email/phone number, areas of expertise (in community and/or human service issues), and referral name.
- To augment recruitment, create an outreach plan that includes a) timeline to post review committee openings, b) names of local organizations, business associations and networks for email distribution, and c) Bainbridge community social media outlets. Outreach should begin as early as 4-5 months prior to committee selection.
- Communicate at the onset, with prospective and selected committee members, the City's expectations with respect to attendance and participation. Reach agreement on number of absences that are acceptable and which meetings must be attended in order to weigh in on the recommendations process (e.g. Absence from applicant presentations might result in recusal from voting).

### RFP Outreach, Guidance and Questions

#### **General**

- From survey: Change the timeframe of application, interviews, and recommendations. Back this up to June.
- RFP outreach and distribution - needs to be broadly distributed through the geographic region and to include as many community-based organizations and social service delivery networks as feasible.
- Have website include a readable PDF of the full RFP plus an OPTIONAL PDF template for the Applicant Cover Sheet, or include a readable PDF of the full RFP. There is the risk of breaking apart the document into three components (instructions, cover sheet, application questions) so it may be best, for readability, to keep as a single pdf document that is linked on our website and available for download.
- Applicant cover should include two checkboxes: To ask if they have been a recipient of HSF funding in the past or if they are newly established (operating under one year). Depending on response, each would lead to a different set of questions in the application
- Language throughout the RFP and all related HSF documents should be consistent in how it refers to approved proposals: grant versus award. If City considers approved proposals "contracts," references to grant and grantee should be replaced with the appropriate City terms.
- Fully understand the implications of a "capital project" request. Be prepared (coordinating with legal counsel, if necessary) to address questions about additional budget reports needed with applicant, and reporting on asset once approved. Or consider not offering capital project as an eligible request.
- Guidance should clarify page spacing (double or single-spaced) and type of signature accepted (scanned or simulated).
- Indicate that applicants are required to have a non-discrimination policy in place.
- Address the eligibility in applying HSF funds for independent contractors (considering principles of sustainability, organizational continuity, legal issues to consider, etc.)
- Address the eligibility in applying city funds for city services (e.g. using HSF grant for city permits)

- Consider whether questions or expectations should be different for long-time HSF recipients (three years or more). For example, expectation of match requirements, performance measures, etc.
- From survey: Instead of divvying up leftover money, keep a small reserve for either emerging organizations or for new ideas or services that may be needed, driven by community demand.

### **Applicant Questions**

- Consider requesting that applicant provide other streams of City funding currently supporting the proposed project. Does HSF have a position if a project is supported by more than one City funding stream?
- Include language in Budget and Outcomes sections that, if approved for an amount different from the proposal submission, the applicant will be requested to update these sections to align with the approved funding amount. Consider these two sections as standalone documents or attachments to the proposal.
- For renewal applicants, include question(s) related to past funding history, successes, and lessons learned
- Refer to [last year's FAQ](#) to ensure relevant questions are adequately addressed and factored into future RFP

### **Budget Form**

- Same budget format (for requested funds) should be required of all applicants regardless of proposal 'type' – general operating support or project request. The format needs to show the applicant's proposed fund allocation across major expense categories for each year of funding.
- Budget instructions for proposed project should clarify whether it is for applicant fiscal year or HSF budget period (recommend for HSF budget period for easier tracking of funds)
- Instructions throughout the application should ensure there is a clear distinction between agency budget and project budget.
- The five budget-related questions under the budget template (in 2016 RFP) could be adjusted in next cycle to move the five budget questions *above* the template in order to keep budget template as a standalone attachment for purposes of post-approval revisions.
- Determine whether full 990 needs to be provided or a link, when available (considering ecological impact)
- For new entities (with one year or less of operations), consider what level of budget information is sufficient to demonstrate applicant's financial health.

### **Review Process**

- Add criteria to scoring rubric that is specific to those applicants with prior HSF funding (e.g. Addressing performance/success with prior HSF grants).
- Consider adjusting criteria for those applicants with less than a year of operational experience.
- Should there be a maximum request amount for applicants with a year or less of operational experience?
- Should there be a maximum request for applicants who have received HSF awards for three consecutive years?
- City staff should provide a matrix of the recent performance of current contract holders applying for a new contract year in order to demonstrate the success of their performance against the goals they stated they would meet. This gives the committee some basis for renewal, questions and evaluation.

- Make sure the evaluation sheets are prioritizing those elements that the city has indicated are important (e.g. aligned with Needs Assessment)

### **Presentation**

- From survey: That reviewers not use the dais in order to create a more level setting between reviewers and applicants. Rather arrange tables in the council room so there is enough room for all participants.
- From survey: Committee members should have at least one other question in mind to ask instead of asking each other at the review/evaluation table
- From survey: The tentative date for panel meeting was not communicated well (outside of those attending the information meeting) and would benefit from clearer expectations about the timing of the presentation portion vs questions.
- Consider providing guidelines, especially for organizations new to the presentations component, to inform applicants what would be most helpful for the committee to hear during presentations.
- Have extra copies of applicant correspondence and materials at the ready for committee members.

# APPENDICES

1. Orientation Materials (includes Meeting Calendar)
2. Reviewer Materials
3. Surveys
  - HSF Advisory Committee Member Survey Questions
  - Applicant Survey Questions



## Orientation Materials

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## Orientation Materials (Advisory Committee)

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### Meeting Goals

- HSFAC members understand legal and public record considerations of citizen review committees
- HSFAC members begin their service by creating shared agreement and understanding of proposed 2017-18 process, committee history, and key stakeholder concerns. Members agree to shared ground rules and discuss what will constitute “success” for committee by December.
- HSFAC members are oriented to key concepts in grantmaking and funding distribution recommendations
- HSFAC members leave feeling energized and with a better understanding of committee roles and responsibilities

**6:00—6:15    Opening & Introductions**

**6:15—6:45    Legal and Public Records Considerations**  
For Citizen Review Committees

**6:45—7:30    Grantmaking 101**

**7:30—8:00    Committee Role(s), Ground Rules and Shared Vision for Success**

# HSFAC 2017-18 Grant Review Process

## Key dates

### October

- **Monday, Oct. 17 at 6:00pm – 8:00pm (Council Conference Room)** – Orientation to City committees, Open Public Meetings Act, Public Records Act (from the City Attorney) & Orientation to HSFAC objectives and process (from The Giving Practice/Philanthropy Northwest)
- **Monday, Oct. 24 at 6:00pm – 8:00pm (Planning Conference Room)** – Receive briefing on 2016 Community Needs Assessment (from consulting firm PRR, Inc.)
- **Friday, Oct. 28 at 4:00 pm - DEADLINE for proposal submissions**

### November

- **First week in November-** Proposals logged in and distributed to Committee members
- **Thursday, Nov. 10 at 6:00pm – 8:00pm (Council Conference Room)** – Initial review discussion of proposals/develop any questions for applicants
- **Thursday, Nov. 17 at 5:00pm – 9:00pm (Council Chambers)** – Receive presentations/Q&A from applicants
- **Monday, Nov. 28 at 6:00pm – 8:00pm (Council Conference Room)** – Review proposals/develop funding recommendation to City Council

### December

- **Thursday, Dec. 15 at 6:00pm – 8:00pm (Council Conference Room)** – Feedback on process/wrap-up

## Key Links

The committee:

<http://www.bainbridgewa.gov/705/Human-Services-Funding-Advisory-Committe>

The City's human services funding more generally:

<http://www.bainbridgewa.gov/600/City-Funded-Human-Services>

## Key Contacts

- Outside Consultant, Grant Program Manager - Leslie Silverman with The Giving Practice/Philanthropy Northwest at [LSilverman@philanthropynorthwest.org](mailto:LSilverman@philanthropynorthwest.org) or 206.443.8468
- City of Bainbridge Island Deputy City Manager - Morgan Smith at 206.842.2545 or [msmith@bainbridgewa.gov](mailto:msmith@bainbridgewa.gov)

### **Committee Introductions:**

#### Round 1:

*Share name & brief background (neighborhood, how long here, professional background, other civic engagement, e.g.)*

#### Round 2:

*Why did you volunteer for HSFAC?*

*One thing you're hoping to learn; one thing you're hoping to offer*

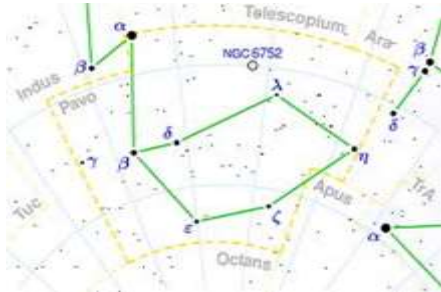
### Meeting Goals

- HSFAC members understand legal and public record considerations of citizen review committees
- HSFAC members begin their service by creating shared agreement and understanding of proposed 2017-18 process, committee history, and key stakeholder concerns. Members agree to shared ground rules and discuss what will constitute “success” for committee by December.
- HSFAC members are oriented to key concepts in grantmaking and funding distribution recommendations
- HSFAC members leave feeling energized and with a better understanding of committee roles and responsibilities

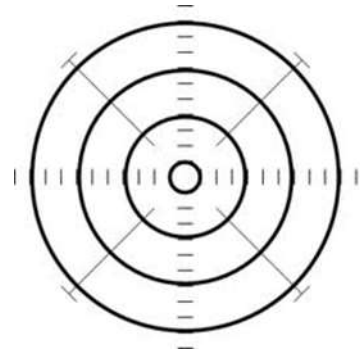
### **Committee Role(s), Ground Rules and Shared Vision for Success**

1. Review Committee Charge
2. How will we feel successful at the end of the process on 12/15?
3. From our committee charge and our shared discussion of success by mid-December, are there any group ground rules or practices we would like to consider?
4. A couple of observations from Ted of group process in grantmaking groups

## Desired Outcome; Learning Posture; Execution Standards



Learning Constellation  
 Organizational culture work  
 5-6 fence posts of core belief  
 Discovery & Sense Making



Execution Bulls-Eye  
 Project management work  
 Knowable outcome metrics  
 Action & Evaluation



Holding More, Loosely  
 80% gets the job done  
 Mistakes seen as evidence of learning  
 Risk pursuit



Holding Less, Tightly  
 100% expected and encouraged  
 Mistakes to be avoided  
 Risk management

## Technical vs Adaptive

“Leading Boldly” [http://www.ssireview.org/pdf/2004WI\\_feature\\_heifetz.pdf](http://www.ssireview.org/pdf/2004WI_feature_heifetz.pdf)

### Technical Problems

- Problem is well defined
- Answer is known
- Implementation is clear
- Solution can be imposed by a single organization

### Examples

- Funding scholarships
- Building hospitals
- Installing inventory controls for a foodbank
- Developing a malaria vaccine

### Adaptive Challenges

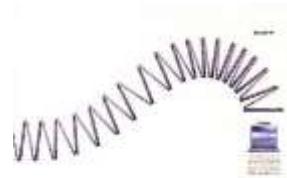
- Challenge is complex
- Answers are not known
- Implementation requires learning
- No single entity has authority to impose solution on the other stakeholders

### Examples

- Reforming public education
- Providing affordable healthcare
- Increasing organizational effectiveness
- Achieving 80% vaccination rates within a malaria-infected region

## Acknowledging Action or Reflection Preference

→



## Grantmaking 101

### Proposal Types

(Examples, not an exhaustive list—at least a dozen types of grants exist)

**General Operating Support**, or “gen op,” refers to grants made to support a nonprofit’s mission rather than specific projects or programs. This is also known as unrestricted or core support as it allows the grantee to use the funds to strengthen the organization or further its charitable purpose as they see fit.

**Program grants** support a specific project or activity of the grantee, and are tied to a specific, project-based outcomes.

*Program grants usually require a specific budget that grantees must stick to. With operating grants, grantees may typically use funds at their discretion—wherever they need it most.*

### Key Financial Documents

1. IRS Form 990
2. balance sheet\*
3. income statement\*
4. audit reports

#### **\*Difference between balance sheet and income statement**

- The balance sheet is a picture of the organization at a point in time.
- The income statement is a picture of an organization over a period of time.

### Three Things to Look for in Financial Documents

1. Relevant new knowledge  
(e.g., they spend 40% of the budget on equipment)
2. Relevant substantive questions to ask the nonprofit organization  
(e.g., Why do you spend so much on equipment?)
3. “I don’t understand” questions to ask the nonprofit organization (or others, if about accounting)  
(e.g., What is the difference between “equipment” and “furniture”?)

## **Sorting and Evaluating Proposals**

Many grantmakers develop a system to place proposals into bins, or categories, prior to making a recommendation. This categorization provides the basis for treating similar proposals equitably and for clarification on how to proceed. Joel Orosz, who served as a program officer at the W.K. Kellogg Foundation for many years, separated proposals into the following four categories:

### **Joel Orosz's Four-Category Sorting System**

1. Good idea/Good proposal
2. Good idea/Bad proposal
3. Bad idea/Good proposal
4. Bad idea/Bad proposal

#### **1. Good Idea/Good Proposal and Bad Idea/Bad Proposal**

These categories lead to easy decisions: fund in the first case, do not fund in the second case.

#### **2. Bad Idea/Good Proposal**

Making a sound decision about a bad idea/good proposal requires separating the beauty of the prose from the value of the proposal. Once this is done, the decision is quite simple: do not fund.

#### **3. Good Idea/Bad Proposal**

This is undoubtedly the most challenging. Proposals that fall into this category most commonly represent smaller, less-sophisticated, and/or new organizations that have worthwhile ideas, but cannot afford to hire skilled grantwriters to present them in a compelling way. The risk that a grantmaker faces is making an automatic assumption that second-rate writing, spelling, and grammar reflects a second-rate project. This can be the case in some instances, but not in others. The challenge, therefore, is to conduct a careful analysis and make a clear and fair distinction. And this, in fact, is only the start of the challenge. It is extremely difficult to present poorly presented proposals to a board for consideration.

Large institutions have grantwriters who know how to put a proposal on paper. Small, community-based organizations often lack these resources, yet they still might be among the best partners for your organization and ones that might be in a strong position to create a significant social return on your investment.

Source: "Proposals: How to Separate the Good, Bad, and the Ugly," *The Insider's Guide to Grantmaking*, Joel Orosz



## Initial Review

- Use **review template** to jot down notes and raise questions. Proposals will begin to blur after a while!
- Craft questions that seek clarity on elements in the proposal or about the organization; attempt to keep tone neutral.
- Review budget to seek alignment to proposed project goals and whether realistic to meet proposed timeline and outcomes.
- Understand how proposal is addressing unmet need(s).
- Begin internal ranking prior to committee discussion. What falls in “strong” bucket?

## Common Funding Recommendations

1. Do not fund.
2. Fully fund the project, with no stipulations.
3. Fully fund the project, with stipulations. This is a good option for proposals with a few correctable items that otherwise would prevent you from funding the proposal. For example, you may choose to fund a project as long as the grantee institutes a board process for evaluating the chief executive.
4. Partially fund the proposal. This occurs for different reasons and in different situations.

## Reviewer Materials

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## Reviewer Materials - Instructions

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### City of Bainbridge Island 2017-18 Human Services Funding Advisory Committee Review Panel Overview

#### Why Use a Citizen Review Panel

The objectives of a citizen review panels are (1) to gain a wide variety of perspectives and experiences that can inform the grant making process, (2) make the granting process transparent, fair, and as free from influence and bias as possible and (3) to create an opportunity to connect citizens in the stewardship of public funds. The City of Bainbridge Island (COBI) recognizes the critical role committee members serve in this capacity and are appreciative of their commitment to upholding a fair and diligent review process.

#### Overall Expectations

Reviewers are expected to:

- Follow open meeting and public disclosure rules
- Remember that this is sensitive information
- Thoroughly understand the selection criteria in the Request for Proposal (RFP) and match those criteria to an applicant's proposal.
- Review [2016 Needs Assessment Report](#) (located on COBI website)
- Report any conflict of interest to COBI and refrain from rating proposals in which you have a conflict.
- Refer to [COBI website](#) for all reference materials cited (RFP, etc.)  
URL: [www.bainbridgewa.gov/600/City-Funded-Human-Services](http://www.bainbridgewa.gov/600/City-Funded-Human-Services)

#### Review Process

The review of the Human Service Fund (HSF) proposals will be a blend of self-directed work and committee work. Committee members are expected to review proposals independently, and come together as a committee to discuss how to prioritize those proposals. The steps in this review process are intended to help committee members develop an efficient and effective review process.

The proposal is intended to give reviewers all of the relevant information to help them make an informed decision, reviewers will have the chance to ask additional questions of the agencies if they feel they need to before the final funding decisions are made. See below for the recommended steps in reviewing each proposal, and process for discussing proposal merits.

#### Attachments

- [Reviewer Worksheet](#) – a worksheet to guide your review for each individual proposal, including a scoring rubric and questions to ask applicant and for committee discussion

- Proposal Scoring Matrix – an excel document listing each applicant name and a place to present scoring and recommended funding amounts.

### **STEP ONE Understand Funding Program and RFP**

- Read COBI's Request for Proposal (provided on website)
  - Specifically, please become familiar with:
    - Definition of human services
    - The framework of the funding program
    - General guidelines
    - Project and applicant eligibility
    - Application requirements
- Read and understand the Proposal Form and Narrative
- Review and understand the emphasis of each area of the proposal
- Please make sure to set aside enough time to review each of your proposals thoroughly. This is NOT a quick process.

### **STEP TWO Initial Read Through (without rating)**

- The proposal materials are available via the website. For those of you who have requested binder copies, they will be available for pick-up at City Hall.
- Complete an initial read-through of each applicant's proposal but don't rate them this time.
- Use this initial read through of the proposals to get a sense of what the proposals are about and how they are organized.

### **STEP THREE In-depth Read Through (with rating)**

- Re-read each proposal and begin rating.
- Make sure to note proposal strengths and weaknesses.
- Make sure to note any questions you have about the application.
- Record ratings and notes on the Proposal Scoring Matrix (excel spreadsheet)

#### **RULES AND TIPS**

- Everyone rates differently – that's ok! Just make sure to be consistent in your ratings
- Only rate a proposal based on the information provided – don't assume anything
- Rate proposals against the criteria in the RFP– not against other proposals
- No fractions or decimals – whole number scores only please!
- Make sure all information required is contained in the proposal.
- You can deduct points for an incomplete proposal but make sure your score is primarily based on the quality of the responses. Remember that this process is brand new for the applicants.

- Just having an answer to each question in the RFP does not justify a high score.
- Proposals should make a strong case, show a compelling need and show that the proposed activities will effectively address that need.
- Proposals should employ good practices and improve the health and human services systems.

**STEP FOUR – PRELIMINARY REVIEW OF PROPOSALS - Thursday, Nov. 10 (6:00 – 8:00pm)**

- In-Person Review/Discussion with Committee
  - Arrive on time & ready to discuss the proposals.
  - Make sure to bring your notes, strengths and weaknesses, and questions.
- Committee will discuss each application and prepare for Panel Presentations

**STEP FIVE - APPLICANT PRESENTATIONS – Thursday, Nov. 17 (5:00 – 9:00pm)**

NOTE: The format for applicant presentations will be determined once the number of applicants is determined. In absence of the time to follow the procedure listed below, priority will be placed on the Committee asking questions of the Applicants.

- Committee will hear a brief (5 minute) presentation on the Applicant's proposal
- Committee will be allowed to ask specific questions of the Applicants
- Committee members will independently revise ratings as needed following the Applicant Presentation

**STEP SIX - EVALUATION OF PROPOSALS/COMPLETE FUNDING RECOMMENDATION - Monday, Nov. 28 (6:00pm – 8:00pm)**

- Committee will discuss each application one final time
- Committee will recommend funding as appropriate
- Committee will agree on funding slate for Council approval

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**Reviewer Materials – Reviewer Worksheet**

**HUMAN SERVICES FUNDING ADVISORY COMMITTEE**

**2017-18**

**Reviewer Worksheet**

**APPLICANT:** \_\_\_\_\_ **Requested amount** \_\_\_\_\_

**Request type (circle one):**      General Operating                      Program Support                      Capital

| <b>Area</b>   | <b>Indicator</b>   | <b>Emphasis</b> | <b>Reviewer Score</b> |
|---|--|-----------------|-----------------------|
| <b>Completeness</b>                                 | Application is: <ul style="list-style-type: none"> <li>• Complete</li> <li>• Includes all appropriate attachments</li> <li>• Answers all relevant questions</li> </ul>   | <b>5</b>        |                       |
| <b>Statement of Purpose</b>                         | substantiate the need in community via most recent demographic and usage data: <ul style="list-style-type: none"> <li>• Well-defined statement of purpose</li> <li>• Need is clear and compelling</li> <li>• Good reference data cited</li> </ul>  | <b>25</b>       |                       |
| <b>Proposal Summary</b>                             | <ul style="list-style-type: none"> <li>• Demonstrates how funding at specified program level (for program support request) or organizational-level (for general operating request) will provide for and improve delivery of programs/ services.</li> <li>• Alignment with goals of the Human Services Element (refer to RFP, p. 8)</li> </ul>  | <b>25</b>       |                       |
| <b>Organizational Strength</b>                      | Conveys the organization's ability to implement the program and services proposed, including: <ul style="list-style-type: none"> <li>• Agency's history of effective service delivery to the community (incl. quantifiable outcomes, where avail)</li> <li>• Appropriately filed IRS Form 990s and other financials as requested in the RFP</li> <li>• Appropriate amount of qualified staff and/or appropriate amount of qualified volunteers to lead, implement, and evaluate proposed activities</li> </ul> | <b>15</b>       |                       |
| <b>Budget</b>                                       | Provide evidence of a beneficial public investment and efficient use of City resources. Budget is: <ul style="list-style-type: none"> <li>• Complete and accurate</li> <li>• Should be reasonable and aligned to support proposal activities and objectives</li> </ul> Additional sources of funding should be identified, where applicable  | <b>10</b>       |                       |
| <b>Estimated Outputs, Outcomes &amp; Assessment</b> | Proposal should include outputs (# served or benefiting from proposed activities) and outcomes resulting in longer-term impact in the community: <ul style="list-style-type: none"> <li>• Depth and breadth of impact clear</li> <li>• Goals for service are achievable</li> <li>• Performance measurements and other means of assessment are clear</li> <li>• Evaluation plan articulates capacity/resources to assess impact and outputs</li> </ul>  | <b>15</b>       |                       |
| <b>Evaluation</b>                                   | Proposal should briefly describe how the organization is continually learning from and improving its services  | <b>5</b>        |                       |
|   | <b>TOTAL</b>   | <b>100</b>      |                       |

**Key strengths of this proposal:**

**Key challenges of this proposal:**

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**For Reviewers First Discussion Meeting (Nov 10) -- Reviewer Questions**

- (1) Do you require additional information to adequately review this proposal? If yes, please describe (we will ask applicants to provide this information).
  
- (2) What questions do you have for the applicants? If yes, please describe (these questions may be asked during the applicant presentations).

**Following Applicant Presentations---Additional Reviewer Comments**

**Initial Review:**

Fully fund \_\_\_\_\_ Partially fund (and amount)\$ \_\_\_\_\_ Not fund at all (if funds available) \_\_\_\_\_

**Final Review:**

Fully fund \_\_\_\_\_ Partially fund (and amount)\$ \_\_\_\_\_ Not fund at all (if funds available) \_\_\_\_\_

# Reviewer Scoring Matrix

## 2017-18 HSFAC Proposal Scoring Matrix

| Human Services Funding<br>Proposal – Basic Evaluation<br>Criteria | Applicant Organizations |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
|---|-------------------------|-----------------------------|-----------------------------|----------------------------------|-----------------------------------|-------------------------|---------------------------------|-------------------|--|--|-----------------------------------|----------------------------------|-------------------|------------|--------------------------|-------------|
|   | Score                   | BI Child<br>Care<br>Centers | BI Child<br>Care<br>Centers | BI Senior<br>Community<br>Center | BI Special<br>Needs<br>Foundation | BI Boys & Girls<br>Club | Bainbridge<br>Youth<br>Services | Helpline<br>House | Housing<br>Resources<br>Board -<br>Homefinding | Housing<br>Resources<br>Board -<br>Independent | Island<br>Volunteer<br>Caregivers | Kitsap<br>Community<br>Resources | Smile<br>Partners | BI Village | YWCA<br>Kitsap<br>County |             |
| Request Type  | Capital                 | Program                     | Operating                   | Operating                        | Operating                         | Operating               | Program                         | Program           | Program  | Operating                                      | Program                           | Program                          | Program           | Program    |                          |             |
| A. Completeness of Application                                    | 5                       |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| B. Statement of Purpose   | 25                      |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| C. Program Summary  | 25                      |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| D. Organizational Strength  | 15                      |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| E. Budget   | 10                      |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| F. Estimated Outputs, Outcomes & Assessment                       | 15                      |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| G. Program Evaluation   | 5                       |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| <b>Total</b>  | <b>100</b>              |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |
| <b>Requested Amount</b>   |                         | \$66,655                    | \$65,300                    | \$110,000                        | \$31,000                          | \$100,000               | \$148,700                       | \$84,000          | \$48,500                                       | \$135,000                                      | \$59,000                          | \$130,000                        | \$25,200          | \$55,800   | \$171,930                | \$1,231,085 |
| <b>Recommended Allocation</b>                                     |                         |                             |                             |                                  |                                   |                         |                                 |                   |  |  |                                   |                                  |                   |            |                          |             |



## Applicant Presentations

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### 2017 HSFAC Presentations

| Time      | Organization              | Presenter                   |
|-----------|---------------------------|-----------------------------|
| 5:00-5:10 | Helpline House            | Joanne Tews                 |
| 5:10-5:20 | BISNF                     | Gary Purdom, Jean Fernandes |
| 5:20-5:30 | HRB - Homefinding         | Penny Lamping               |
| 5:30-5:40 | HRB - Independent Living  | Penny Lamping               |
| 5:40-5:50 | BISCC                     | Mike Laney                  |
| 5:50-6:00 | B&G Club                  | Kelly Otis                  |
| 6:00-6:10 | <b>BREAK</b>              |                             |
| 6:10-6:20 | IVC                       | Rita Elsberry               |
| 6:20-6:30 | BICCC - Capital           | Shelley Long                |
| 6:30-6:40 | BICCC - Support           | Shelley Long                |
| 6:40-6:50 | KCR                       | Monica Bernhard             |
| 6:50-7:00 | YWCA                      | Denise Frey, Sandy Carlton  |
| 7:00-7:10 | Smile Partners            | Imbert Mathee               |
| 7:10-7:20 | BI Village                | Sandy Wight, Judy McKenzie  |
| 7:20-7:30 | Bainbridge Youth Services | Tom McCloskey               |

## Recommendations

| Applicant                                    | Type      | Two Year Budget |                      | %   | Position 1 | Position 2 | Position 3 | Position 4 | Position 5 | AVG        |
|--|-----------|-----------------|----------------------|-----|------------|------------|------------|------------|------------|------------|
|  |           | Requested       | FINAL RECOMMENDATION |     |            |            |            |            |            |            |
| BI Child Care Centers                        | Capital   | \$ 66,655       | -                    | 0%  | \$ -       | \$ -       | \$ -       | \$ 33,328  | 30,000     | 12,666     |
| BI Child Care Centers                        | Program   | \$ 65,300       | 44,000               | 67% | \$ 64,000  | \$ 30,000  | \$ 45,000  | \$ 32,650  | 30,000     | 40,330     |
| BI Senior Community Center                   | Operating | \$ 110,000      | 39,000               | 35% | \$ 73,000  | \$ 36,000  | \$ -       | \$ 71,500  | 12,500     | 38,600     |
| BI Special Needs Foundation                  | Operating | \$ 31,000       | 28,000               | 90% | \$ 28,000  | \$ 25,000  | \$ 25,000  | \$ 31,000  | 29,500     | 27,700     |
| BI Boys & Girls Club                         | Operating | \$ 100,000      | 73,000               | 73% | \$ 70,000  | \$ 70,000  | \$ 75,000  | \$ 50,000  | 74,000     | 67,800     |
| Bainbridge Youth Services                    | Operating | \$ 148,700      | 105,000              | 71% | \$ 119,000 | \$ 110,000 | \$ 90,000  | \$ 81,785  | 69,000     | 93,957     |
| Helpline House                               | Program   | \$ 84,000       | 44,000               | 52% | \$ -       | \$ 50,000  | \$ 50,000  | \$ 50,400  | 69,000     | 43,880     |
| Housing Resources Board - Homefinding        | Program   | \$ 48,500       | 30,000               | 62% | \$ 15,000  | \$ 25,000  | \$ 36,000  | \$ 29,100  | 43,000     | 29,620     |
| Housing Resources Board - Independent Living | Program   | \$ 135,000      | 103,000              | 76% | \$ 102,000 | \$ 110,000 | \$ 100,000 | \$ 74,250  | 100,000    | 97,250     |
| Island Volunteer Caregivers                  | Operating | \$ 59,000       | 51,000               | 86% | \$ 54,000  | \$ 45,000  | \$ 55,000  | \$ 50,150  | 49,000     | 50,630     |
| Kitsap Community Resources                   | Program   | \$ 130,000      | 64,000               | 49% | \$ 72,000  | \$ 59,000  | \$ 90,000  | \$ 41,600  | 30,000     | 58,520     |
| Smile Partners                               | Program   | \$ 25,200       | 22,000               | 87% | \$ 18,000  | \$ 10,000  | \$ 19,000  | \$ 25,200  | 24,000     | 19,240     |
| BI Village                                   | Program   | \$ 55,800       | -                    | 0%  | \$ -       | \$ -       | \$ -       | \$ 34,020  | 0          | 6,804      |
| YWCA Kitsap County                           | Program   | \$ 171,930      | 57,000               | 33% | \$ 45,000  | \$ 90,000  | \$ 75,000  | \$ 55,018  | 100,000    | 73,004     |
|  |           | \$ 1,231,085    | \$ 660,000           |     | \$ 660,000 | \$ 660,000 | \$ 660,000 | \$ 660,001 | 660,000    | \$ 660,000 |

## SURVEYS

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# Advisory Committee Survey

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Dear Committee members-

A special thank you again for a productive meeting two weeks ago, although I think we would all agree that this was not an easy one given the quality of programs and services brought forth and the needs in the community.

While the experience is still fresh, we are requesting your feedback so that we can make improvements in future rounds of funding where **citizens** are a part of the recommendations process. By clicking on the survey link below, you will find five questions and opportunities to comment about what worked well and what to improve.

## [SURVEY](#)

We will also be seeking feedback from the applicants about the process for applying for Human Services funding. The collective input from all stakeholders will be invaluable.

It was a pleasure to meet each of you and be a part of this process together. Thank you!



There are five questions seeking your input in four areas: the committee member application process, the training and orientation, the proposal review and recommendation process, and overall facilitation and Council leadership. Thank you for your full commitment to serving as a committee member, and your thoughtful and candid feedback so that we can strive to make this a valuable experience for future community reviewers and applicants.

## 1. The Committee application process was clear in communicating the process and expectations.

Strongly Disagree      Strongly Agree

What worked well specific to the committee application process? Areas for improvement?

## 2. The orientation and training fully prepared me for this role.

|   | Strongly disagree     |                       |                       |                       | Strongly agree        |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Open meeting/ public records training               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Orientation to Committee roles and responsibilities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Presentation of community needs report              | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What worked well? Areas for improvement?

## 3. The review process was well-organized, thorough and fair.

|  | Strongly disagree     |                       |                       |                       | Strongly agree        |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Self review of proposals               | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Applicant presentations                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Development of funding recommendations | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What worked well? Areas for improvement?

## 4. Council leadership and committee facilitation met my expectations.

| Strongly disagree     |                       |                       |                       |                       | Strongly agree        |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What worked well? Areas for improvement?

## 5. Please provide any additional suggestions in the space below.

Thank you!

## Applicant Survey

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Dear Applicant,

On behalf of the City of Bainbridge Island, I want to share our appreciation for your interest in the Human Services Fund. While we were pleased to see the interest, it is challenging to see so many needs -- particularly when the total funds requested are far greater than the amount of funds available (2:1). We recognize the time, coordination, and planning that go into developing a high quality proposal and please know that the citizen review committee concluded this process with a deeper understanding and respect for the programs and services you bring to the community *every day*.

This is the first year the HSF is awarding funds for a two year term and we are committed to continuous improvement as we begin to plan the next funding cycle. We invite your earnest feedback as to what worked well and suggestions for improvement. Please see the link below that will take to you an online survey (all responses are anonymous) administered by a third party, The Giving Practice. There are five questions seeking your input in four areas: the RFP and application process, the presentation, the review and recommendation stage, and overall communications and exchanges with the Council members, leadership and facilitator.

- **Survey [LINK](#)** - deadline **January 6 (Friday)**

Again, we appreciate your thoughtful and candid feedback so that we can strive to make this a valuable experience for future citizen reviewers and applicant organizations, and ultimately, our community at large.

Best regards,



## Human Services Fund Applicant Feedback

There are five questions seeking your input in four areas: the RFP and application process, the presentation, the review and recommendation stage, and overall communications and exchanges with the Council members, leadership and facilitator. We appreciate your thoughtful and candid feedback so that we can strive to make this a valuable experience for future community reviewers and applicant organizations. Thank you for your invested leadership and services to making our community a stronger, healthier place for all.

### 1. The request for proposals and application process was clear and reasonable in communicating the process and expectations.

|   | Strongly Disagree        |                          |                          |                          | Strongly Agree           |
|---|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Outreach communications notifying the public about the opportunity.                   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Request for Proposals explanation of funding purpose, criteria, process and timeline. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Application proposal questions and budget.  | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

What worked well specific to the RFP and application process? Areas for improvement?

### 2. We felt prepared for the presentations and had a clear understanding of what to expect.

| Strongly disagree     |                       |                       |                       |                       | Strongly agree        |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What worked well? Areas for improvement?

3. Our organization felt the review and recommendations process was well conducted.

|   | Strongly disagree     |                       |                       |                       | Strongly agree        |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Process appeared fair.                                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recommendations delivered in organized and timely manner. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Our organization felt respected.                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What worked well? Areas for improvement?

4. Council leadership and committee facilitation successfully demonstrated a fair and consistent process in making funding recommendations.

| Strongly disagree     |                       |                       |                       |                       | Strongly agree        |
|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What worked well? Areas for improvement?

5. Please provide any additional suggestions in the space below.

---