

Committee of the Whole Work Session of July 26, 2016.

6:00 p.m.

Call to Order.

Roll Call.

- A. Discussion on General Fund and Community Development Block Grant Human / Public Service Funding Application Review Process
 - 1. General Fund and Community Development Block Grant (CDBG) Program human/public service funding process - Priority Points:
 - a. Requests for Proposals - Outreach
 - b. Evaluation Criteria
 - c. Funding Awards/Allocations
 - d. Potential for increasing appropriations
- B. Petitions and Statements of Citizens:
- C. Summary of Discussion on General Fund and Community Development Block Grant Human / Public Service Funding Application Review Process.

Adjournment.

TO: Honorable Mayor and City Council

FROM: Vicki Georgeau, Director of Community Development 

SUBJECT: General Fund & Community Development Block Grant (CDBG) Program
human/public service funding process

In preparation for the July 26, 2016 Committee of the Whole meeting, the following information is provided in regard to the annual General Fund and Community Development Block Grant (CDBG) Program human/public service funding process.

- Each November, prior to the start of the annual budget process, the Department of Community Development disseminates requests for applications to the following:
 1. All agencies that submitted grant applications in the prior five-year period;
 2. The Kalamazoo County LISC Affordable Housing Partnership;
 3. The Kalamazoo/Battle Creek United Way; and
 4. The Kalamazoo County Multi-Purpose Collaborative Body.

With regard to 2-4 above, these entities are regional housing and human service planning and funding organizations. Each of these entities are requested to send out the request for grant applications to local non-profits. This effort ensures dissemination to the broader community. As additional information, attached is a sample letter and application provided to potential applicants. A preliminary projection of funding available from both the General Fund and CDBG Program, as well as a summary of the established evaluation criteria is provided in the letter requesting applications.

- The Human Services Board has a long-established evaluation tool (attached), which is used to review and score applications for both the General Fund and CDBG Program. City staff also use this evaluation tool in reviewing requests for funding. This evaluation tool is the primary criteria used to score applications and determine funding levels recommended to City Council.
- With regard to the process, the Human Services Board and City Council receive the application packets in mid-December and the Board receives a presentation from all applicants during their first meeting in January. The Board members then individually review and score each application. At their second meeting in January, the Board meets to review and compare applicant scores and then reaches consensus on the Board's average score and ranking of applications. At the Board's meeting in February, the Board then considers:
 1. Applicant scores/ranking;
 2. Funding available vs. funding requests; and
 3. Performance of current grantees and funding levels of current grantees in comparison to total grant requests.

Based on the above, and after a lengthy deliberation process, the Board makes a recommendation on

funding for all applicants to City Council. As part of this process, city staff also prepare an evaluation and provide funding options to the Board to consider, prior to making a final recommendation on funding to City Council.

As additional background information, and at the recommendation of City Council, the Human Services Board completed an extensive review and revision of the evaluation criteria and review process in 2007. The attached October 29, 2007 communication from the Board was accepted by the City Council on November 6, 2007.

In March 2008, the Board again revised the evaluation criteria by: adding a mission statement consistent with Section 2-272 of the City Code, which outlines the purpose of the Human Services Board; adding a new criterion regarding basic human needs that awards additional points to applicants that provide a service that meets a basic human need; and adding a second Board meeting each January for the Board to review members scores and ranking of applicants. In March 2009, the process was again revised to ensure the Board received a recommendation from city staff prior to the final deliberations on annual grant applications. Subsequent to the more significant revisions noted above, the Board has engaged in an annual Continuous Quality Improvement process, in which they consider the most recent funding cycle and whether tweaks to the application form and/or evaluation criteria are appropriate. This process is completed each fall prior to the start of the next funding round.

In addition to city staff, Human Services Board Chair Woodin and other members will be in attendance at the July 26th COW to further discuss this issue with City Council.

FUNDING: Per Council policy, 0.55% of annual General Fund revenue is to be allocated to human/public services.

Per federal regulations, a maximum of 15% of the annual CDBG Program entitlement grant plus program income received in the prior fiscal year can be allocated to human/public services.

- Attachments:**
1. Human Services Funding Evaluation Criteria
 2. Sample letter and application form - request for human service funding application
 3. October 29, 2007 communication to City Council regarding human/public service evaluation criteria
 4. Grant awards and applications - FY 2016-17 to FY 2010-11

HUMAN SERVICES FUNDING EVALUATION CRITERIA

In addition to the criteria listed below, which apply to the service(s) to be provided with the funding requested, the following Mission Statement for the Human Services Board will also serve as a guide to the Board in its review and recommendation of funding applications:

The mission of the Human Services Board is to facilitate the satisfaction of the basic human needs of all Portage citizens by educating and advising the City Council, Portage human service agencies, and the community at large.

1. EXTENT TO WHICH THE PROGRAM ADDRESSES A BASIC HUMAN NEED
(QUESTION 10 ON APPLICATION)

(Select only one that most closely fits)

“Basic Human Needs” are considered to include:	Score
Provision of housing (e.g. emergency, transitional, permanent, homelessness/ prevention such as eviction, foreclosure, and/or utility shut-off prevention)	50
Provision of food (e.g., direct food distribution, food bank/pantry, Meals on Wheels)	40
Provision of health and safety services (e.g., emergency services, health care, crisis intervention, etc.)	30
Provision of job training, educational services, transportation, or quality of life enhancements	20
Provision of clothing (e.g. direct, free/low-cost clothing and/or distribution)	10
None of the above	0

2. ACCESSIBILITY OF THE PROGRAM SERVICE TO PORTAGE RESIDENTS
(QUESTION 11 ON APPLICATION)

5 = Not Accessible to 25 = Easily Accessible

(Select only one that most closely fits)

“Accessibility” can be considered to be:	Score
Services located in Portage	25
Services regularly provided in Portage (e.g. at a facility located in Portage or at the citizen’s location)	20
Services accessible after normal (8 a.m.-5 p.m.) business hours, 24-hour phone hot line, or other methods	15
Services available / accessible via public bus routes and/or transportation by agency	10
None of the above	0

3. DOES APPLICANT HAVE WORKING RELATIONSHIPS / COLLABORATIONS WITH OTHER ORGANIZATIONS SERVING PORTAGE RESIDENTS?
(QUESTION 13 ON APPLICATION)

5 = Fragments Service Delivery to 25 = Coordinates or Improves Service Delivery

(Select only one that most closely fits)

“Coordinates or Improves Service Delivery” can be generally considered to be:	Score
Services are unique in community and not duplicated by others	25
Services are similar to others but carefully coordinated to avoid duplication	20
Services are similar to others but Information and Referral is routinely provided to avoid fragmentation	15
Services are similar to others and some fragmentation of services occurs	10
None of the above	0

4. OF PORTAGE RESIDENTS SERVED, ARE MAJORITY ECONOMICALLY OR SOCIALLY DEPRIVED, SENIOR CITIZENS, OR PERSONS WITH DISABILITIES?
(QUESTION 14 ON APPLICATION)

5 = No Special or Unusual Needs to 25 = Economically or Socially Deprived

(Select only one that most closely fits)

“Economically or Socially Deprived” can be generally considered to be:	Score
Clientele is extremely low income and/or disabled and/or victim of abuse and/or other situation	25
Clientele is low income and/or senior citizens	20
Clientele is vulnerable or at risk of one of the above	15
Clientele is in need of services	10
None of the above	0

5. PERCENT OF PORTAGE CLIENTS SERVED
(QUESTION 5 ON APPLICATION)

5 = Few to 25 = Many

(Select only one that most closely fits)

“Many” clients served can be considered to be:	Score
Portage clients equals 51-100% of clients served by agency	25
Portage clients equals 31-50% of clients served by agency	20
Portage clients equals 16-30% of clients served by agency	15
Portage clients equals 7.6-15% of clients served by agency	10
Portage clients equals 1-7.5% of clients served by agency	5
Portage clients equals >1%	0

6. AMOUNT OF OUTREACH EFFORTS
(QUESTION 15 ON APPLICATION)

5 = No Outreach to 25 = Extensive Outreach Efforts to People in Needs

(Select only one that most closely fits)

“Extensive Outreach” can be considered to be: regular newsletter distribution; cable access PSAs; advertisements/marketing campaigns; service listing in I&R databases/directories (2-1-1, United Way, etc.); presentations to community organizations/schools; open houses; coordination/provision of services with/at other agencies; participation in community collaborative efforts (e.g., MPCB, KLAHP, etc.)	Score
Utilizes 5 or more methods of outreach to Portage residents	25
Utilizes 4 methods of outreach to Portage residents	20
Utilizes 3 methods of outreach to Portage residents	15
Utilizes 2 methods of outreach to Portage residents	10
Utilizes 1 method of outreach to Portage residents	5

For new programs/agencies in the community for less than five years, use criterion 7(A).

For programs/agencies in the community for five or more years, use criterion 7(B).

(QUESTION 6 (YEAR STARTED) AND 3 (% FUNDED) ON APPLICATION)

7(A). ABILITY OF AGENCY TO RECEIVE OTHER FUNDING **OR**

5 = Extensive to 25 = Limited

(Select only one that most closely fits)

“Limited” ability to receive other funding for “new” applicants can be generally defined as follows:	Score
Grant request equals 51% or more of the agency’s budget	25
Grant request equals 31-50% of the agency’s budget	20
Grant request equals 11-30% of the agency’s budget	15
Grant request equals 6-10% of the agency’s budget	10

Grant request equals 0-5% of the agency's budget	5
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7(B). ABILITY OF AGENCY TO LEVERAGE OTHER FUNDING

5 = Limited to 25 = Extensive

(Select only one that most closely fits)

"Extensive" leveraging of other funding for "previous" applicants can be generally defined as follows:	Score
Grant request equals 0-5% of the agency's budget	25
Grant request equals 6-10% of the agency's budget	20
Grant request equals 11-30% of the agency's budget	15
Grant request equals 31-50% of the agency's budget	10
Grant request equals 51% or more of the agency's budget	5

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November 10, 2015

Kathy Roberts
Kalamazoo LISC Affordable Housing Partnership
Local Initiatives Support Corporation
119 North Church Street, Suite 201
Kalamazoo, MI 49007

RE: FY 2016-17 Human/Public Services Funding Information and Application

Dear Kathy:

The City of Portage provides Human/Public Services funding each year from the General Fund and Community Development Block Grant (CDBG) Program. For FY 2016-17, Human/Public Services funding will be available July 1, 2016. This fiscal year, the City of Portage allocated \$125,625 from the General Fund and \$42,510 from the CDBG Program for human/public services. At this time, the exact amount available for FY 2016-17 is not known. However, the amount from the General Fund may range up to \$120,142 while the amount from the CDBG Program is estimated to be \$34,400.

This information and application are provided to you to disseminate to potentially interested agencies within the greater Kalamazoo area. To qualify for funding from the CDBG Program, the agency must deliver a service with direct benefit to low income persons within the City of Portage. Further, the agency must be able to provide information on the income and demographics of the clientele served, and provide adequate records that funding provides a direct service to residents of Portage per requirements of the U.S. Department of Housing and Urban Development.

For both the General Fund and CDBG Program, the following qualifying criteria will be considered in the evaluation of funding requests:

- ❖ Extent to which the program services meet a basic human need (which includes: provision of housing, food, health and safety services, job training, transportation, and quality of life enhancements);
- ❖ Extent to which program services are accessible to Portage residents;
- ❖ For Portage residents to be served, the extent to which clientele are economically or socially deprived, senior citizens or persons with disabilities;
- ❖ The number of Portage residents to be served;
- ❖ Amount of outreach efforts to Portage residents to be served; and
- ❖ For new programs/agencies in the community, the ability of the agency to receive other funding; or, For programs in existence in the community for five or more years, and previously funded by the City of Portage for three or more previous years, the ability of the agency to leverage other funding.

The City of Portage Human Services Board will convene a public meeting to consider human/public service funding requests that is tentatively scheduled for January 7, 2016. All applicants are requested to have a representative attend the public meeting and are requested to make a brief presentation on the funding request to the Board. Additional information regarding this public meeting will be mailed in late December to each agency that submits an application.

Please note that our application form has changed this year. While a copy of the new application is attached, applicants must use the fillable *Human Services Funding Grant Application* form available on our website at: <http://www.portagemi.gov/Boards-and-Commissions/HumanServicesBoard.aspx> (on the right side under Documents). If there are any questions or concerns with the new application form, please contact Elizabeth Money at 269-324-9280 or via email at moneye@portagemi.gov.

If an agency plans to submit an application, please have them complete the application form as noted above, print and sign the form, attach the required documents, and include a cover letter summarizing the funding request, amount, and the proposed service to be delivered.

Applications are due by Friday, December 4, 2015 at 5:00 p.m. to:

City of Portage Department of Community Development
7900 South Westnedge Avenue
Portage, Michigan 49002

If you have any questions regarding the application process or need additional information, please do not hesitate to contact me at (269) 329-4477, or Elizabeth Money, Neighborhood Program Specialist, at (269) 324-9280. Thank you for your assistance.

Sincerely,



Vicki Georgeau, AICP
Director

Attachment: Application

cc: Elizabeth Money, Neighborhood Program Specialist

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CITY OF PORTAGE HUMAN SERVICES FUNDING GRANT APPLICATION

Check One: ☐ **General Fund*** ☐ **CDBG Fund***

***Same application form used but separate submissions required for General Fund requests and CDBG Fund requests.**

GENERAL INFORMATION

Name of Organization:

Address:

Name of Board President:

Contact Person:

Phone #: email:

Web address:

If an applicant is not able to provide the following, it may not be eligible for funding. Please contact City of Portage staff if the answer to any of these questions is No:

- Is the organization able to track the number of Portage residents served? ☐ Yes ☐ No
- Is the organization able to provide Comprehensive General Liability Insurance and Motor Vehicle Insurance for \$1,000,000 per occurrence with the city, its employees, and its appointed and elected officials named as an insured party? ☐ Yes ☐ No
- Is the organization able to provide a yearly independent audit performed by a Certified Public Accountant? ☐ Yes ☐ No

ORGANIZATION INFORMATION

How long has the organization been in existence:

What is the organization's overall purpose or mission statement:

Please indicate the most recently approved fiscal year total annual budget for your organization and the fiscal year it covered:

Total budget (\$)	Fiscal year (e.g. July 1, 2014 – June 30, 2015)
\$	

Is the organization an incorporated, not-for-profit organization: ☐ Yes ☐ No

Is the organization Internal Revenue Service 501(c)(3) classified: ☐ Yes ☐ No

Is your agency affiliated with any religious organization: ☐ Yes ☐ No

GRANT APPLICATION INFORMATION

1. Please list the individual programs and requested funding levels from the city:

	Name of Program	Funding amount requested (\$)
	NOTE: the same program numbers assigned in question #1 carry through to question #6.	
1.		\$
2.		\$
3.		\$
4.		\$
5.		\$

2. Please indicate the specific intended use of city funds requested:

	Use of funds
1.	
2.	
3.	
4.	
5.	

3. For the program to be funded, please provide the total annual program budget and the percent of that budget being requested from the city:

	Total annual program budget (\$)	Percent (%) of funding requested from city
1.	\$	%
2.	\$	%
3.	\$	%
4.	\$	%
5.	\$	%

4. For the program to be funded, what is the average cost of delivering one unit of service (for example, one hour of counseling, one night of shelter, etc.):

	Cost to deliver one unit of service (\$)	Explain/describe one unit of service
1.	\$	
2.	\$	
3.	\$	
4.	\$	
5.	\$	

5. For the program to be funded, please indicate the following* for your most recently completed fiscal year:

	Total number of program clients served	Total number of Portage residents served	Portage residents served as percent (%) of total clients served
1.			%
2.			%
3.			%
4.			%
5.			%

*Please explain if you are unable to fully track this information:

6. When was the program for which funding is requested first established:

	Year
1.	
2.	
3.	
4.	
5.	

7. Is the organization funded by the United Way: ☐ Yes ☐ No
If yes, how much annual total funding is provided by the United Way: \$

8. For the programs to be funded, please list other significant sources of funds expected or requested, including specific information (agency name, amount requested and purpose):

9. Please identify the entire geographic area benefited by the services for which funding is requested (e.g. County of Kalamazoo, City of Portage, City of Kalamazoo, etc.):

10. For the programs to be funded, please identify which basic human needs are being addressed (check all that apply):

Provision of Housing:

- ☐ Emergency/Homeless Shelter
☐ Transitional or Permanent Housing
☐ Homelessness Prevention (Eviction/Foreclosure/Utility Shut-off Prevention)
☐ Other (explain): _____

Provision of Food:

- ☐ Direct Food Distribution
☐ Food Bank/Pantry
☐ Meals on Wheels
☐ Other (explain): _____

Provision of Health and Safety Services:

- ☐ Emergency Services
☐ Health Care

- ☐ Crisis Intervention
- ☐ Other (explain): _____

Provision of Quality of Life Enhancements:

- ☐ Job Training
- ☐ Educational Services
- ☐ Transportation
- ☐ Other (explain): _____

Provision of Clothing:

- ☐ Direct Distribution of Clothing
- ☐ Free/Low Cost Clothing and/or Distribution
- ☐ Other (explain): _____

Other (explain): _____

11. For the programs to be funded, how are service(s) accessible to Portage residents (check all that apply):

- ☐ Services located in Portage
- ☐ Services regularly provided in Portage (e.g., directly to the citizen, at a facility located in Portage, etc.) (explain): _____
- ☐ Services accessible after normal business hours of 8:00 a.m. – 5:00 p.m.
- ☐ 24-hour phone hot line
- ☐ Services available/accessible via public bus routes and/or transportation by an agency
- ☐ Other (explain): _____

12. What other organizations in Portage or Kalamazoo County provide the same or similar service(s):

13. For the programs to be funded, which of the following best describes relationships and collaborations your organization has with other organizations serving Portage residents:

- ☐ Services are unique in the community and not duplicated by others
- ☐ Services are similar to others but steps are taken to avoid duplication (explain): _____
- ☐ Services are similar to others but information and referral is routinely provided to avoid fragmentation (explain): _____
- ☐ Services are similar to others and some duplication of services occurs (explain): _____
- ☐ Other (explain): _____

14. For the programs to be funded, a majority of clients are (check all that apply):

- ☐ Extremely low income (30% or below of area median income) and/or disabled and/or a victim of abuse and/or other situation
- ☐ Low Income (80% or below of area median income) and/or senior citizens
- ☐ Client is vulnerable or at risk of one of the above
- ☐ Client is in need of services
- ☐ Other (explain): _____

15. For the programs to be funded, how are outreach efforts made to notify Portage residents of the availability of services (check all that apply):

☐ Television commercial/ads

☐ Radio commercials/ads

☐ Newspaper ads

☐ Print media ads

☐ Posters

☐ Flyers

☐ Direct mailings

☐ Informational tables/kiosks

☐ Presentations

☐ Website/Social Media

☐ Open houses

☐ Community Events

☐ Other (explain): _____

16. If the programs are not funded or fully funded, how will the program(s) be affected (include changes in staffing, property acquisition, and costs):

17. If you are a current grantee and have requested an increase in funding, please explain the rationale for the increased funding request:

18. Please describe the anticipated long-term sustainability of the programs for which funding is requested:

19. Please indicate how many public and private dollars are leveraged for each dollar of city funding requested:

Please attach the following documents for City of Portage review:

1. Sample brochure(s) describing the services offered, particularly services to be funded by a City of Portage grant.
2. Most recently completed audit.
3. Financial Statements for most recently completed fiscal year which include revenue and budget information.
4. List of agency Board of Directors, including business and/or organizational affiliation.

AUTHORIZED SIGNATURE

I hereby verify that the information presented above is correct to the best of my knowledge.

Name (type)

X

Signature

Title (type)

Date

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CITY OF PORTAGE

COMMUNICATION

TO: Honorable Mayor and City Council

DATE: October 29, 2007

FROM: Maurice S. Evans, City Manager



SUBJECT: Human/Public Service Funding Evaluation Criteria – Information Only

As discussed by City Council at the October 23, 2007 meeting, attached is the complete October 12, 2007 correspondence and attachments from Cory Bailes, Chairman of the Human Services Board, regarding the revised human/public service funding evaluation criteria.

As indicated by Chairman Bailes, over the past several months, the Board has reviewed funding evaluation criteria utilized in other communities and by public and private funding entities to develop the revised evaluation criteria. The Department of Community Development, which provides staff liaison services to the Human Services Board, assisted the Board with research and finalization. The City Administration concurs with the recommendation of the Board to utilize the grant application form and revised evaluation criteria in the FY 2008-09 human/public service funding cycle.

Dissemination of the funding applications to potential applicants has been discussed in the context of balancing the requests for human/public service funding with the resources available to fund programs and activities in the community that are consistent with City Council goals and objectives. The Human Services Board will have additional discussions during the November 1, 2007 Board meeting, prior to the annual grant application mailing that is again scheduled to be accomplished by the City Administration not later than mid-November.

Attachments: October 12, 2007 communication from the Human Services Board

c: Jeffrey M. Erickson, Director of Community Development

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**TRANSMITTAL FROM
HUMAN SERVICES BOARD**

DATE: October 12, 2007

TO: Honorable Mayor and City Council

FROM: Cory Bailes, Chair, Human Services Board

SUBJECT: Human/public service funding evaluation criteria – Information Only

On behalf of the Human Services Board, I am writing in regard to the recommendation by City Council that the Human Services Board review and revise, as may be appropriate, evaluation criteria used in the annual human/public service funding award process through the City of Portage General Fund and Community Development Block Grant (CDBG) Program. In the Board's review of this issue, several community, foundation and funding agency evaluation criteria and processes were evaluated by the full Board and by an Ad Hoc Subcommittee of the Board over the period of several months. Many issues of interest and concern were raised which included: reducing the subjectivity of the existing evaluation criteria; broadening the range of potential applicants; increasing the diversity of grant awards; while ensuring consistency with city goals and objectives and funding program services that address critical community needs.

Attached are the revised human/public services funding evaluation criteria and grant application forms that the Board will utilize during for the FY 2008-09 funding cycle. The following summarizes the revisions in the attached documents:

- Reduce Subjectivity of Existing Evaluation Criteria: The evaluation criteria have been revised to provide more definitive review criteria, which should be beneficial to the process. The Board concurred that there should be eight criteria, and the existing criterion with regard to utilization of user fees eliminated, as most applicants do not utilize user fees. In addition, to further reduce the degree of subjectivity, the Board determined that weighting of each criterion be eliminated, and rather, that each criterion have a point score ranging from one to five.
- Revised Application Form: The Board concurred that the application form be revised so it more closely corresponds with the evaluation criteria. Questions one through 14 are provided to gather general information regarding the applicant and service(s) for which funding is requested, while questions 15 through 22 correspond to the eight evaluation criteria. In addition, questions 23 and 24 are intended to gather additional general information that has been of interest to the Board, City Council and City Administration in the past, and have therefore been retained.

In addition to the revisions described above, the Board recommended that applications be disseminated to potential applicants, and that the cover letter reference the eight evaluation criteria (excluding the descriptive score ranking tables) to assist agencies with preparation of applications that are relevant to city goals and community needs.

Finally, the Board determined that it is appropriate to annually review the evaluation criteria and funding process at the end of each funding cycle to ensure the process is effective.

Feel free to contact me, or any other Human Services Board member, if there are additional questions or comments regarding this matter.

Attachments: Human Services Application form and Evaluation Criteria

c: Vicki Georgeau, Deputy Director of Neighborhood Services
James R. Hudson, City Clerk



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**HUMAN SERVICES
APPLICATION FOR FUNDING**

Check One: **General Fund** _____ **CDBG Fund** _____

GENERAL INFORMATION

1. Name of Organization: _____
2. Address: _____
3. Contact Person: _____
4. Phone #: _____
5. Is the Organization an incorporated, not-for-profit organization? Yes _____ No _____
6. Has the Internal Revenue Service classified the organization as a 501 (c)(3)?
Yes _____ No _____
7. Does your agency undergo a yearly audit of its financial
records by an outside independent public accountant? Yes _____ No _____
8. Number of Full time employees? _____
9. Number of part-time employees? _____
10. Name of Board President? _____
11. How long has the organization been in existence? _____
12. Is your agency affiliated with any religious organization? Yes _____ No _____

ORGANIZATION INFORMATION

13. State the overall purpose or mission of the agency:

- 14. Please list the individual service(s) and funding level for which you are seeking City of Portage funding and indicate the specific intended use of City funds requested (e.g. staff salaries, new program, replacement of lost revenue, etc.):**

- 15. For the service(s) to be funded, describe how the service(s) are accessible to Portage residents:**

- 16. For the service(s) to be funded, describe how the service(s) addresses a critical need in Portage:**

17. For the service(s) to be funded:

- a.** Describe the working relationships and collaborations your organization has with other organizations serving Portage residents.

- b.** Do any other organizations in Portage or Kalamazoo County provide the service(s)?
Yes _____ No _____.

- c.** If yes, please list other agencies which provide same or similar services:

- 18. For the service(s) to be funded are the majority of clients economically or socially deprived, senior citizens, or persons with disabilities? Yes _____ No _____. Please explain.**

19. For the service(s) to be funded:

a. Is your agency able to track the number of clients served who reside in the City of Portage? Yes _____ No _____

b. Indicate the total number of **Portage** clients to be served with the funding requested.

c. Indicate the total number of **Portage** clients served in the most recently completed year. (if new service, please indicate).

d. What percent of the total clients served in the most recently completed year reside within the City of Portage? _____% (if new service, please indicate).

e. Please identify the entire geographic area(s) benefited by the service(s) for which funding is requested (e.g. County of Kalamazoo, City of Portage, City of Kalamazoo, etc.)

20. For the service(s) to be funded, list and describe the organization's outreach efforts to Portage residents. That is, through what means would Portage residents be notified of the availability of the service(s)?

21. For the service(s) to be funded, describe the extent to which your agency uses volunteers, including estimated volunteer hours per month. If use of volunteers is limited due to the type of service(s) provided by the organization, please explain:

22.

- a. What is the total annual budget of your agency? \$ _____ Year 20 _____
- b. What is the total annual budget of the program for which funding is requested? \$ _____
- c. Is the organization a United Way Agency? Yes _____ No _____ If yes, how much funding is provided by the United Way on an annual basis? \$ _____
- d. Please list the other sources of funds expected or requested for the service(s) to be funded, including specific information (agency name, amount requested and purpose) from which a grant/funding is or will be sought.

23. For the service(s) to be funded, what is the average cost of delivering one unit of service to an individual or family? (For example one hour of counseling, one night of shelter, etc.)

\$_____ Please explain and describe Unit of Service

24. Please attach the following documents for City of Portage review:

- a. Sample brochure(s) describing the services offered, particularly services to be funded by a City of Portage grant.
- b. Most recently completed audit.
- c. Financial Statements for most recently completed fiscal year which include revenue and budget information.
- d. List of agency Board of Directors, including business and/or organizational affiliation.

AUTHORIZED SIGNATURE

I hereby verify that the information presented above is correct to the best of my knowledge.

Name (Please Print or Type)

Signature

Title

Date

HUMAN SERVICES FUNDING EVALUATION CRITERIA

1. ACCESSIBILITY OF THE PROGRAM SERVICE TO PORTAGE RESIDENTS

1 = Not Accessible to 5 = Easily Accessible

(Select only one that most closely fits)

"Accessibility" can be considered to be:	Score
Services located in Portage	5
Services regularly provided in Portage (e.g. at PCOC, City Hall, Senior Center, Portage Schools, Police/Court offices and other similar locations)	4
Services accessible after normal (8 a.m.-5 p.m.) business hours, 24-hour phone hot line, or other methods	3
Services available / accessible via public bus routes and/or transportation by agency	2
None of the above	1

2. EXTENT TO WHICH THE PROGRAM ADDRESSES A CRITICAL NEED IN PORTAGE

1 = Not A Critical Need to 5 = Critical

(Select only one that most closely fits)

"Critical Need" can be generally considered to be such if identified high or medium priority in one or more of the following official, published documents:	Score
City of Portage FY 2005-09 CDBG Consolidated Plan and/or annual City Council goals	5
City of Portage Comprehensive Plan, Capital Improvement Plan, Recreation Plan or Portage 2025 Visioning Project Final Report	4
Local (e.g., Portage and/or Kalamazoo County specific) needs analysis/reports regarding human/public services	3
State or national needs analysis/reports regarding human/public services	2
None of the above	1

3. DOES APPLICANT HAVE WORKING RELATIONSHIPS / COLLABORATIONS WITH OTHER ORGANIZATIONS SERVING PORTAGE RESIDENTS?

1 = Fragments Service Delivery to 5 = Coordinates or Improves Service Delivery

(Select only one that most closely fits)

"Coordinates or Improves Service Delivery" can be generally considered to be:	Score
Services are unique in community and not duplicated by others	5
Services are similar to others but carefully coordinated to avoid duplication	4
Services are similar to others but Information and Referral is routinely provided to avoid fragmentation	3
Services are similar to others and some fragmentation of services occurs	2
None of the above	1

4. OF PORTAGE RESIDENTS SERVED, ARE MAJORITY ECONOMICALLY OR SOCIALLY DEPRIVED, SENIOR CITIZENS OR PERSONS WITH DISABILITIES?

1 = No Special or Unusual Needs to 5 = Economically or Socially Deprived

(Select only one that most closely fits)

"Economically or Socially Deprived" can be generally considered to be:	Score
Clientele is extremely low income and/or disabled and/or victim of abuse and/or other situation	5
Clientele is low income and/or senior citizens	4
Clientele is vulnerable or at risk of one of the above	3
Clientele is in need of services	2
None of the above	1

5. NUMBER OF PORTAGE CLIENTS SERVED

1 = Few to 5 = Many

(Select only one that most closely fits)

"Many" clients served can be considered to be:	Score
Portage clients equals 51-100% of clients served by agency	5
Portage clients equals 31-50% of clients served by agency	4
Portage clients equals 16-30% of clients served by agency	3
Portage clients equals 7.6-15% of clients served by agency	2
Portage clients equals 0-7.5% of clients served by agency	1

6. AMOUNT OF OUTREACH EFFORTS

1 = No Outreach to 5 = Extensive Outreach Efforts to People in Needs

(Select only one that most closely fits)

"Extensive Outreach" can be considered to be: regular newsletter distribution; cable access PSAs; advertisements/marketing campaigns; service listing in I&R databases/directories (2-1-1, United Way, etc.); presentations to community organizations/schools; open houses; coordination/provision of services with/at other agencies; participation in community collaborative efforts (e.g., MPCB, KLAHP, etc.)	Score
Utilizes 5 or more methods of outreach to Portage residents	5
Utilizes 4 methods of outreach to Portage residents	4
Utilizes 3 methods of outreach to Portage residents	3
Utilizes 2 methods of outreach to Portage residents	2
Utilizes 1 method of outreach to Portage residents	1

7. USE OF UNPAID VOLUNTEERS

1 = No Use to 5 = Extensive Use

(Select only one that most closely fits)

"Extensive Use of Unpaid Volunteers can be generally considered to be:	Score
Unpaid volunteers equals 51% or more of the agency's full-time equivalent (FTE) employees	5
Unpaid volunteers equals 31-50% of the agency's FTE employees	4
Unpaid volunteers equals 21-30% of the agency's FTE employees	3
Unpaid volunteers equals 11-20% of the agency's FTE employees	2
Unpaid volunteers equals 0-10% of the agency's FTE employees	1

NOTE: If unpaid volunteers are inappropriate due to the type of services provided by organization, applicant get score of three.

- 8(A). *For new programs/agencies in the community for less than five years, and funded by the City of Portage for zero to two years, use criterion 8(A). Otherwise, use criterion 8(B):*

ABILITY OF AGENCY TO RECEIVE OTHER FUNDING OR

1 = Extensive to 5 = Limited

(Select only one that most closely fits)

"Limited" ability to receive other funding for "new" applicants can be generally defined as follows:	Score
Grant request equals 51% or more of the agency's budget	5
Grant request equals 31-50% of the agency's budget	4
Grant request equals 11-30% of the agency's budget	3
Grant request equals 6-10% of the agency's budget	2
Grant request equals 0-5% of the agency's budget	1

- 8(B). *For programs/agencies in existence in the community for five or more years, and funded by the City of Portage for three or more previous years, use criterion 8(B)*

ABILITY OF AGENCY TO LEVERAGE OTHER FUNDING

1 = Limited to 5 = Extensive

(Select only one that most closely fits)

"Extensive" leveraging of other funding for "previous" applicants can be generally defined as follows:	Score
Grant request equals 0-5% of the agency's budget	5
Grant request equals 6-10% of the agency's budget	4
Grant request equals 11-30% of the agency's budget	3
Grant request equals 31-50% of the agency's budget	2
Grant request equals 51% or more of the agency's budget	1

FY 2016-17		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 98,000	\$ 82,386
Housing Resources	\$ 20,000	\$ 20,735
YWCA	\$ 11,137	\$ 11,685
Catholic Charities	\$ 11,130	\$ 11,635
Gryphon Place	\$ 2,500	\$ 2,500
Goodwill	\$ 2,000	\$ 1,500
Lending Hands	\$ 8,000	\$ 1,500
Subtotal	\$ 152,767	\$ 131,941
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 34,400	\$ 41,928
Subtotal	\$ 34,400	\$ 41,928
TOTAL	\$ 187,167	\$ 173,869

¹ Portage Community Center total funding = \$124,314 vs. total funding requested of \$132,400.

FY 2015-16		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 100,000	\$ 80,475
Housing Resources	\$ 20,000	\$ 19,780
YWCA	\$ 8,915	\$ 11,130
Catholic Charities	\$ 11,137	\$ 11,100
Gryphon Place	\$ 7,000	\$ 2,340
Kalamazoo Anti-Human Trafficking Coalition ²	\$ 2,500	\$ 800
Subtotal	\$ 149,552	\$ 125,625
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 35,000	\$ 42,510
Subtotal	\$ 35,000	\$ 42,510
TOTAL FUNDING	\$ 184,552	\$ 168,135

¹ Portage Community Center total funding = \$122,985 vs. total funding requested of \$135,000.

² Kalamazoo Anti-Human Trafficking Coalition ultimately not funded due to contractual issues.

FY 2014-15		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 98,000	\$ 83,535
Housing Resources	\$ 20,000	\$ 18,110
YWCA	\$ 8,695	\$ 8,915
Catholic Charities	\$ 11,137	\$ 9,433
Gryphon Place	\$ 6,000	\$ 2,077
Goodwill	\$ 2,650	\$ 1,020
Community Homeworks ²	\$10,000	\$0
Subtotal	\$ 146,482	\$ 123,090
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 32,000	\$ 37,972
Subtotal	\$ 32,000	\$ 37,972
TOTAL FUNDING	\$ 178,482	\$ 161,062

¹ Portage Community Center total funding = \$121,507 vs. total funding requested of \$130,000.

² Community Homeworks was not funded because application was for housing rehabilitation vs. human services.

FY 2013-14		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 98,000	\$ 84,476
Housing Resources	\$ 25,000	\$ 17,295
YWCA	\$ 9,250	\$ 8,501
Catholic Charities	\$ 11,137	\$ 8,989
Gryphon Place	\$ 6,000	\$ 1,976
Prevention Works ²	\$10,000	\$ -
Subtotal	\$ 159,387	\$ 121,237
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 32,000	\$ 31,804
Subtotal	\$ 32,000	\$ 31,804
TOTAL FUNDING	\$ 191,387	\$ 153,041

¹ Portage Community Center total funding = \$116,280 vs. total funding requested of \$130,000.

² Prevention Works was not funded because they did not provide a direct service and without full funding, implementation was uncertain.

FY 2012-13		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 107,000	\$ 80,513
Housing Resources	\$ 25,000	\$ 17,400
YWCA	\$ 14,000	\$ 8,570
Catholic Charities	\$ 11,137	\$ 9,080
Gryphon Place	\$ 6,000	\$ 2,000
Subtotal	\$ 163,137	\$ 117,563
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 29,000	\$ 36,000
Subtotal	\$ 29,000	\$ 36,000
TOTAL FUNDING	\$ 192,137	\$ 153,563

¹ Portage Community Center total funding = \$116,513 vs. total funding requested of \$136,000.

FY 2011-12		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 89,342	\$ 79,109
Housing Resources	\$ 25,000	\$ 19,504
YWCA	\$ 14,000	\$ 9,405
Catholic Charities	\$ 11,137	\$ 9,109
Subtotal	\$ 139,479	\$ 117,127
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 47,000	\$ 47,334
Subtotal	\$ 47,000	\$ 47,334
TOTAL FUNDING	\$ 186,479	\$ 164,461

¹ Portage Community Center total funding = \$126,443 vs. total funding requested of \$136,342.

FY 2010-11		
GENERAL FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 96,342	\$ 78,217
Housing Resources	\$ 24,200	\$ 18,835
YWCA	\$ 14,000	\$ 9,070
Catholic Charities	\$ 11,137	\$ 8,775
Gryphon Place	\$ 6,000	\$ 3,000
Subtotal	\$ 151,679	\$ 117,897
CDBG PROGRAM FUND		
Applicant	Funding Requested	Funding Approved
Portage Community Center ¹	\$ 40,000	\$ 43,350
Subtotal	\$ 40,000	\$ 43,350
TOTAL FUNDING	\$ 191,679	\$ 161,247

1 Portage Community Center total funding = \$121,567 vs. total funding requested of \$136,342.