

ALBEMARLE COUNTY FY 27 AGENCY FUNDING APPLICATIONS

Andy Bowman, Assistant Chief Financial Officer

Kaki Dimock, Chief Human Services Officer

Stacy Pethia, Director of Housing

Agenda

- Welcome – Andy Bowman, Kaki Dimock
- Conditions of eligibility & award requirements – Andy Bowman
- Overview of Processes
 - Community Non-Profit Capital Process – Andy Bowman
 - Arts & Culture Process – Andy Bowman
 - Human Services Funding Process (HSFP) – Kaki Dimock
- Q&A

Conditions of Eligibility

- 501(c)3 Nonprofit (or equivalent)
- Substantial service provision in the County
- Agency in existence and program in operation for minimum of two years
- Incorporated and registered with Virginia Dept of Agriculture and Consumer Services (VDACS)
- Annual audit if budget is over \$750,000 and every three years if less than \$750,000
 - Note: this threshold has been increased from the \$500,000 amount used in past years
- Fundraising and administration less than 25% of overall expenses
- Agency is overseen by a volunteer board

Appropriation Agreement

- Any funds appropriated herein to recipients who are not directly governed by the Board of Supervisors (“External Recipients”) may be used only for the exclusive and singular purpose for which the funds are appropriated, subject to any additional conditions as stated in the Approved Budget, County policies, County agreement with the External Recipient, or as otherwise required or proscribed by law or ordinance.
- External Recipients have an affirmative fiscal duty to account for the appropriate and most responsible use of the funds and, as an express condition of the appropriation and in addition to other reporting requirements, must provide an accounting and such other reports as are requested by the County, in a form determined by the Department of Finance and Budget, within 30 days of any such request.

Appropriation Agreement (continued)

- External Recipients must be able to at all times account for any County funds appropriated to them separate from donations from any other source. Failure to adhere to these conditions or to the purposes for which the appropriations are made may, among other things, affect future appropriations.
- The Department of Finance and Budget is authorized to withhold transfers of appropriated funds to any External Recipient until any pending requests for reporting and accounting have been met to the County's satisfaction.
- If any funds allocated to an External Recipient remains unused at the end of the fiscal year, the unspent balance must be returned to the County unless a County agreement with the External Recipient, an agreement to which the County is a party pertaining to the funding terms of the External Recipient, or the applicable law, provides otherwise.

Community Non-Profit Capital Request Process

Direct questions to [*budget@albemarle.org*](mailto:budget@albemarle.org)

Community Non-Profit Capital Request Process

Background

- Sept. 2022: Board of Supervisors approved creation of process
- July 2023: Board updated framework

Intent: Process for requests to be considered at the same time when developing the Capital Improvement Plan (CIP)

Community Non-Profit Capital Request Process

Framework:

1. Projects must meet the County's definition of a capital project, as applied to County Government and Public School requests.
2. Prioritized projects will align with objectives identified in the FY 24-28 Strategic Plan.
3. Projects will be evaluated in the context of the total FY 27 - 31 Capital Improvement Plan.

Community Non-Profit Capital Request Process

Framework:

4. The project should leverage funding from other sources
 - Related, if the project serves a significant portion of another locality or localities, the community non-profit should seek a commitment from those localities

5. The community non-profit should have the capacity to administratively manage the project

Community Non-Profit Capital Request Process

Framework:

6. Projects have documentation that they are far enough along to provide confidence that it will succeed; request timeline should reflect that
7. Projects should increase services, not only maintain existing facilities.
8. Projects from community non-profits where the County may have a long-standing obligation to continue to provide services if the entity did not exist will be prioritized over those where such as obligation does not exist.

Arts, Cultural, and Festivals Process

Direct questions to [*budget@albemarle.org*](mailto:budget@albemarle.org)

Arts, Cultural, and Festivals Process

No change from last year's process

- Applications will take place via NextZen site
- Remain separate process from human services evaluations
- Questions to understand programs and impacts
- Reclassify agencies into one of four categories:
 - Larger programs that bring visitors & support local economy
 - Smaller local cultural programs
 - Arts-focused
 - Recreational or educational opportunities
- Intent in funding recommendations:
 - Create tiers by category, considering prior funding decisions
 - Less emphasis on existing vs new programs

Human Services Funding Process

FY27 HSFP Application Schedule

September 23 & 26: Applicant Orientations

October 1: Application site available

November 1: Applications due by 11.59 PM

**Week of November 3-7: Review Team begins meeting;
questions sent to agencies**

Week of December 8-12: Review Team completes meetings

**December 19: Team work completed; application ratings sent
to Dept. of Finance and Budget**

Human Services Goals and Priorities - Overview

- Albemarle County has ten human service goals that are worded the same as last year.
- Albemarle County has also identified certain areas of need that are considered priorities for FY27.
- Programs that address a human services goal but not one of the priorities are not precluded from funding.

Albemarle County Human Service Goals

1. Provide services that remove barriers affecting the financial stability of at-risk and underserved communities
2. Provide for a continuum of housing interventions with the overall goal of achieving safe, affordable and permanent housing for at-risk individuals and families
3. Provide services aimed at building an equitable, sustainable food system or increasing access to healthy, culturally appropriate food
4. Provide services that drive community health and improve outreach or educational efforts in rural areas and/or vulnerable urban communities
5. Provide services that address disparities in access or opportunity for youth of color

Albemarle County Human Service Goals

6. Provide services aimed at reducing the achievement gap for socioeconomically disadvantaged students
7. Provide services increasing accessibility of medical and dental support for low-income and geographically isolated households
8. Provide supportive services for survivors of abuse, neglect, trauma, or violence
9. Provide services aimed at decreasing disparity or disproportionality in outcomes for persons interacting with the legal or criminal justice system
10. Provide services increasing support and accessibility for persons with limiting conditions or different abilities, including problems with mental health or substance abuse

Albemarle County Human Services Priorities for FY27

1. Safety net program that addresses basic needs of Albemarle County residents (food, shelter, etc)
And/or
2. Program addresses the needs of a particular vulnerable population
 - a. Seniors in poverty
 - b. Adolescents with mental health concerns
 - c. Persons with disabilities in poverty
 - d. Households with children under 5 years of age
 - e. Sexual assault and domestic violence survivors
 - f. Persons experiencing homelessness or extreme housing instability

Selecting Metrics

- For FY27, applicants should select or create a metric that reflects the strength of their program in addressing the selected Human Services goal(s).
- At least one outcome metric should be provided for each Human Services goal selected.
- Outputs vs. outcomes: While outputs show or enumerate what was produced or accomplished, outcomes show **the effect** of these outputs on the desired result.
- In reporting results, applicants should provide data based on the metric that was selected for the fiscal year being reported (i.e. FY25)

Application questions

(Questions with a star * preceding indicate those that will be completed in the abbreviated application)

- *Describe your program.
- Describe the specific needs your program addresses, using accurate local data. We are particularly interested in how local data demonstrates genuine need.
- Describe how your program meets the human services area(s), and priority needs selected. We are seeking to fund organizations that have as direct an impact on the need area as possible.
- Describe the strategies and activities the program uses to address the needs identified. Please indicate if you are using a promising, best or proven practice approach to the problem and cite any references to the best practice. Also, please indicate if you are engaging a collaborative approach in your work to the address the community need.

Application questions (con.)

- How will your organization evaluate the program's success? What metrics are used, and how are they selected? What evaluation tools does your organization use for the program? We anticipate organizations will be engaged in some kind of continuous improvement process, utilize a formal evaluation process of some kind, use feedback from clients to inform changes to services, and make decisions rooted in data.
- *Describe the Albemarle County beneficiaries served by the program in FY2025, and those you anticipate serving in FY2027. Include elements such as geographic area, particular subsets of the population served, special features and needs of the population served. (Please Note: a beneficiary is a direct intended recipient of services provided.)
- *Provide at least one outcome you will use to measure program success for FY2027. How will achieving this outcome help Albemarle County meet the Human Services goal you selected? Outcome measures should indicate what number (#) and percentage (%) of intended beneficiaries will achieve the desired result.

Application questions (con.)

- *Identify and report on the outcome measures you sought to achieve in your program for FY2025 (table). Provide outcomes regardless of whether or not you received County funding.
- *If your program did not achieve the projected FY2025 outcomes, provide a brief explanation of why the projected outcomes were not met.
- Does your program provide any benefits to the broader Albemarle community beyond benefits to direct program recipients (i.e. secondary beneficiaries; leveraging additional funds; prevention of higher cost services; significant use of, and opportunities for, volunteers; enhanced employment opportunities; etc.)? Please explain.
- Explain how your program collaborates with other entities and/or key community stakeholders (including formal agreements or MOUs). How does this collaboration result in improved service and better outcomes for program beneficiaries and for Albemarle County.

Application questions (con.)

- *How much money are you requesting from Albemarle County for this program in FY2027?
- *What is the projected total budget amount for the program? *We generally prefer not to be the primary funding source for any program.*
- *What other sources of funding, if any, has your organization tried to leverage in support of the program?
- *What percent of your budget is for administration and fundraising expenses?
- *Describe the revenues and expenses for this program only (table).
- Provide a brief explanation for any increase or decrease in program revenues or expenses greater than 10% from the previous year.
- *Describe what your organization would do if it does not receive funding from Albemarle County. Be as specific as possible.

Review Criteria and Process

- Team members will individually review the applications using the review criteria and ratings
- Team(s) will meet to review scores, discuss and reach consensus
- Teams may send questions about applications to agency contacts for additional clarification
- Teams rate applications using the scoring instrument; teams do not rate agencies
- HSFP scores and ranking information is delivered to the Department of Finance and Budget
- Final recommendations are made by the County Executive
- Final funding decisions are made by the Albemarle County Board of Supervisors, based on resources available and competing needs

TIPS:

- Don't assume prior knowledge of your agency or program on the part of reviewers. Although some reviewers will have such knowledge, others will not. Describe your program and strategies as if speaking to someone who is not familiar.
- For the same reason, don't use jargon; and clearly explain acronyms
- Although we do not ask for it in the application, think and write in terms of your program logic model, moving from problem description, to program description, to how you deploy strategies and activities that address the problem, to intended and produced outcomes (i.e. how successful is the program in having an impact on the problem).
- **Provide Albemarle County data** – Regional, state or national data may also be used to help describe the extent of the problem addressed by your program, but emphasis throughout should be on County data.

TIPS:

- Be succinct - just because you have more space, you do not have to use it. But also be thorough in responding to all parts of the question.
- You can save application as a draft and go back into the application as often as you want prior to the deadline.
- Have someone unfamiliar with your program read your application. Can they understand the descriptions and the underlying logic model?
- **Do not click submit** until you are completely satisfied with your application. After submission, you cannot revise application without notifying the staff.
- If you run into technical problems with the application or have a question about the intent of a particular application question, contact the staff.

HSFP APPLICATION

Link to the NextZen application portal:

<https://albemarle-county.wizehive.app/organization/about>

Contacts for HSFP applications

For questions on process:

John Freeman, Project Specialist

jfreeman@albemarle.org; 434-981-5417

For questions on NextZen site:

Stacy Pethia, Director of Housing

spethia@albemarle.org

For questions to County:

Kaki Dimock, Chief Human Services Officer

kdimock@albemarle.org