



**Pre-Application
Conference**

Welcome & Meeting Overview

- PCL Staff Introductions
- Review Request for Investment Requirements and Forms
- Questions and Answers



- We're going to try to keep our presentation short so we leave as much time as possible for Q&A.

Request for Investment

- **RFI Instructions**

- Part 1: PCL and Program Area Strategies
- Part 2: Funding Requirements
- Part 3: Application Components and Submission
- Part 4: Funding Process
- Definitions and Guidance for Tables I and II

- **RFI Questions**

- 3 Sections requiring narrative response
- 3 exhibits



- 6 RFIs – Early Childhood, Mentoring, After School, Child Abuse Prevention & Intervention, Foster Care and Hunger Relief; all use the same RFI template and include modifications as appropriate for each program area.
- RFI divided into two components: RFI Instructions & RFI Questions
- We will provide a quick overview of what you will find in each section of the RFI and highlight some important aspects in each part.
- **Be sure to read the complete RFI instructions before you begin answering the questions. Email questions@portlandchildrenslevy.org if anything is unclear.**

RFI Instructions

Part 1: PCL and Program Area Strategies

- Introduction to PCL
- Background Data on 2014 Funding
- Development of Program Area Strategies 2018-19
- Program Area Strategies



- The background data on 2014 funding provides context regarding competition in each program area.
- The program area strategies reflect what we heard through the community engagement process.
- Proposals **must address one or more of the program area strategies** listed in the table. Programs may employ multiple strategies in a given program area. Strategies all relate to direct service delivery.
- The strategy table also includes features that we are seeking. **Features emphasize PCL's priorities, not requirements, for each strategy.** Points are awarded to applications that include the features.

RFI Instructions

Part 2: Funding Requirements

- Applications must address Program Area and one or more program area strategies
- Available Funding and Size of Grants
- Eligible Service Population
- City of Portland Residency
- Duration of Investment
- Eligible Applicants
- City of Portland Rules and Guidelines



- Each RFI includes the approximate funding amount available for the 36-month period (7/1/20-6/30/23)
- **Minimum grant: \$65,000/year; Maximum grant: \$675,000/year**
- Applicant organizations must have had **at least \$217,000 in total organizational revenues** in their last closed fiscal year to apply for PCL funds.
- Organizations may submit more than one application in one program area, and in multiple program areas. **PCL will total all requests from a single organization, divide by 3 years, and that number must be less than 30% of the organization's annual revenues** for the last closed fiscal year.
- Non-profit corporations (501(c)(3)), local education agencies, community colleges and universities are eligible to apply for PCL funding.
- Collaborations or partnerships of organizations can apply but must choose a lead agency to apply and take responsibility for reporting and billing. The lead agency may subcontract with partners to deliver portions of the proposed program.

RFI Instructions

Part 3. Application Components and Submission

- Application Form (Cover Sheet and Narrative Response)
- Required Additional Materials
- Application Submission



- Application Form, Exhibit A: Includes Application Coversheet and pre-formatted space for an applicant to complete the narrative portion of the application.
- **Be sure to adhere to formatting requirements.**
- **In addition to the Application Form, following items are required**
 - Table 1. Demographics of Organization's Clients, Staff and Board Members, Exhibit B
 - Proposed budget, using budget form, Exhibit C
 - Annual organization-wide budgets for the current operating fiscal year, and the most recent closed fiscal year that include sources and uses of all funds.
 - Most recent audited financial statement if applicant has revenues of at least \$1 million for the last closed fiscal year (if less than \$1 million will be required to obtain an audit in first year of program delivery).
 - Only required materials will be reviewed; Do not submit additional materials including letters of support.
- **Applications due by 5pm on Wednesday, November 20th. PCL will reject late applications.** Send to email address listed in RFI. Be sure to follow the file formats for each part of the application and don't PDF the entire application.
- PCL will acknowledge receipt of applications within 2 business days. **Call us if you don't receive an email confirmation in that timeframe.**

RFI Instructions

Part 4. Funding Process

- Pre-Application Conference
- Questions and Answers about the Application and Funding Process
- Review and Scoring by Volunteers
- Staff Funding Recommendations

- The funding process incorporates the recommendations made by PSU after they conducted a review of PCL's grantmaking process.
- Volunteers, up to 5 per application, will review and score each proposal based on the criteria defined in the Scoring Form which is included in each RFI.
- Volunteer recruitment and screening is a more formalized process than in the past. Will balance review groups with people with equity, diversity and inclusion experience and knowledge and people with program area experience and knowledge.
- Scores for each section of the RFI are averaged between the reviewers to get the final score for the section. The averaged scores are added together for a total program score. For organizations that submit multiple applications, staff will average Section I scores from all reviewers who scored an application from that organization.
- After reviewers have scored applications, staff will develop a list of applications recommended for funding in each program area. Allocation Committee and applicants will receive staff's recommendations and rationale by March 1, 2020.
- See the RFI for the rationale staff will use to develop their recommendations.

RFI Instructions

Part 4. Funding Process (continued)

- Testimony in Support of Application
- Advocacy Limits
- Allocation Committee Funding Decisions
- City Council Approval
- Public Meetings Law and Requirements
- Notification



- Applicants will have the opportunity to provide a written response to the staff recommendation for Allocation Committee consideration.
- Applicants will also have the option of submitting video testimony. PCL staff will record video testimony. **Videos produced by applicants will not be accepted.**
- **Applicants may not advocate to Allocation Committee members with the intent of influencing the outcome of the funding process during the entire funding period.**
- Allocation Committee will make funding decisions at 2 public meetings in April. **No public comment will be heard at these meetings.** Applicants will be notified of meeting dates by March 1, 2020.
- Applicants will be notified as soon as City Council decision is made; anticipate by 5/31/20.
- Contracts begin 7/1/20.

Definitions and Additional Guidance

For Completing Tables I and II



- **Be sure to review the definitions and additional guidance before you complete the demographic tables (Tables I and II).**
- Table I is intended to focus on some key racial/ethnic demographic data for each of the following groups: all clients served by the organization, direct service staff of the organization, management staff of the organization, board of the organization, AND children and/or their caregivers to be served by the proposed program. This table allows reviewers and PCL to understand in general the racial/ethnic demographics of the organization, and to see the proposed program's racial/ethnic demographics in that organizational context. Staff of the applicant organization refers to employees, not contractors or partners.
- The additional demographic data requested in Table II help reviewers and PCL understand additional considerations for overall program design.
- PCL assumes that applicants have their own methods for collecting and analyzing demographic data on the clients, staff and board members of their organizations. Applicants should do their best to use their data in response to PCL's definitions.
- PCL Staff acknowledges that applicants may not have complete or accurate demographic information. The RFI asks that applicants discuss how they gathered the demographic information presented so that reviewers can understand how people (staff and clients) are asked to provide the information, whether the applicant has estimated the data, and if so on what basis.

RFI Questions

Section I: Organizational Capacity and Commitment to Racial Equity, Diversity, and Inclusion

- A. Organization History and Purpose
- B. Leadership and Strategic Direction
- C. Staff Recruitment, Retention, Promotion and Training; Board Training
- D. Language Accessibility
- E. Service User Voice and Influence
- F. Community Engagement and Collaboration
- G. Achievements and Accountability
- H. Demographics Characteristics of Organization's Clients, Staff and Board Members



- PCL will fund organizations with demonstrated success and experience, grounded in racial equity, diversity, and inclusion, serving children and families most affected by racial inequities and injustice.
- PCL is no longer asking if an applicant organization is “culturally specific” or “culturally responsive”. This part of the RFI questions focuses on the applicant organization’s commitment to racial equity, diversity, and inclusion across 8 dimensions of organizational development and management.
- Applicants that identify as culturally specific and/or culturally responsive must all respond to the same questions in this RFI.
- **Section I: 7-page maximum narrative plus Exhibit B, Table I.**
- **Applications must score at least 23 of 36 points in this section to be considered for funding.**
- **Be sure to read the definitions and guidance for completing Table I in the RFI instructions before completing the Demographics Characteristics of Organization's Clients, Staff and Board Members.**

RFI Questions

Section II: Proven Program Design and Effectiveness

- A. Program Summary and Connection to Application Organization
- B. Population to be Served
- C. Outreach and Recruitment of Population to be Served
- D. Program Design
- E. Explanation of the Program Design
- F. Program Results, Quality, and Improvement



- PCL will invest in programs that use best practices and achieve positive outcomes with children and/or families.
- **12-page maximum narrative.**
- **Applications must score at least 38 of 54 to be considered for funding.**
- **Be sure to read the definitions and guidance for completing Table II in the RFI instructions before completing the Estimates of Population to be Served table.**

RFI Questions

Section III: Program Budget and Budget Justification

- **Program Budget:** a detailed line item budget using the budget form in Exhibit C
- **Narrative Budget Justification:**
 - A. Total Program Costs, PCL Request and Other Funding Sources
 - B. Budget Justification and Cost Calculations
 - C. Organizational Financial Experience



- PCL seeks to fund cost effective programs that demonstrate:
 - All costs are justified, reasonable and appropriate for the proposed program.
 - They are operated by organizations with experience managing and accounting for government funding in accordance with Generally Accepted Accounting Principles (GAAP).
- **4-page maximum narrative plus Exhibit C, FY 20/21 budget.**
- There is not a minimum score requirement for this section.
- **The budget you prepare should clearly link to the proposed program and account for true program costs and quality aspects of your services.**
- **Follow the instructions for completing the budget form in Section III of the RFI Questions.**

Exhibits

- **Exhibit A:** Application Form (Cover Sheet and Narrative Response)
- **Exhibit B:** Demographics of Organization's Clients, Staff and Board Members
- **Exhibit C:** FY 20-21 Proposed Program Budget

Exhibit A

- Cover sheet has fillable fields; can do signature via Microsoft (help menu) or PDF coversheet only; rest of application narrative in Word format.
- Formatted word doc to meet app format requirements

Exhibit B

- Instructions/tips as red triangles in cells- complements instructions in RFI
- Staff: direct staff work directly with children/families; management= supervisors of direct service staff and all other executive management

Exhibit C

- Instructions/tips as red triangles in cells- complements instructions in RFI
- If Y2, Y3 budgets substantially different than Y1, see Q7 in Q/A digest for how to handle in application.

Questions & Answers

Sign-up for weekly email updates at

www.portlandchildrenslevy.org/available-funding/sign-rfi-updates



- We will post the questions and answers from each pre-application conference on the PCL website within 3 business days of the conference.
- If questions come up after the pre-application conference, email to questions@portlandchildrenslevy.org. We will take questions through 11/18.
- We issue individual responses to questions within 3 business days and post a weekly digest of questions asked and answers provided to individual applicants on our website <http://www.portlandchildrenslevy.org/questions>
- Be sure to sign up to receive weekly email updates. Updates will include a digest of the questions/answers as well as other information pertinent to applicants. You can sign up on the Levy website at <http://www.portlandchildrenslevy.org/available-funding/sign-rfi-updates>