

Allocation Review

Presentation to the
James City County Board of Supervisors
September 23, 2008

Background

- Allocation Review Team (ART) formed to review human service non-profit agency budget requests in an effort to increase citizen involvement.
- Joint funding application developed for James City County, City of Williamsburg and the United Way.

Overview of the Process

- October-The electronic application is made available.
- November-Recipients are invited to a joint informational meeting.
- January-Deadline for applications
- Early February-ART holds its annual review.

Community Representatives

FY 09

- Steve Chantry-Executive Director for Student Services-WJCC Public Schools
- J. Terry Deaver-Parks and Recreation Commission member
- Donna Dittman Hale-Consultant to Nonprofits
- Clive Fenton-Education Committee of NAACP
- Diane Joyner-Social Services Advisory Board member

Prior to the Review Day

- Staff meet to decide critical elements to include in the letter sent to ART members.
- Each agency is assigned a staff member.
- Staff meet to conduct preliminary review of the applications and determine next steps.
- Agencies are identified for presentations and consent calendar.

What was Important for FY 09?

- Letters were sent to the agencies in advance of the application advising them of the financial constraints.
- A critical review compared funding requests with data on residents served and units of service provided.
- Percentages of FY 08 funding received and residents served for each locality was calculated.

ART Recommendations

- ART members reviewed 22 applications.
- The group recommended a total of \$495,235 for these agencies compared to the FY 08 Approved Budget total of \$632,228.

Important Elements of the Review

- Supports the Strategic Plan.
- Fund only direct service providers, not coalitions.
- If the service were not provided by the agency would local government have to assume their responsibilities?

Important Elements of the Review

- Financial statements
- Are County residents being served in proper proportion?
- Has the agency requested proportionate funding from the other localities?
- We try to determine the effectiveness of services and the outcomes for residents of James City County.

How Can the Process be Improved?

- The application can be cumbersome and repetitive.
- The budget format needs to be simplified to be more understandable.
- Staff will be assigned to each agency to work with them throughout the year.

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Questions/Comments?