

# **FY19 CDAC ORIENTATION**

# **WELCOME!**

- **THANK YOU FOR VOLUNTEERING YOUR TIME AND ENERGY TO ASSIST LOW-INCOME COUNTY RESIDENTS IN RECEIVING THE MOST CRITICAL SERVICES FOR THE LIMITED FUNDING AVAILABLE.**

# OVERVIEW

- This presentation is designed to provide some general information about the logistics of the CDAC and application evaluation process.
- The presentation covers:
  - GENERAL INFORMATION
  - RATING CRITERIA
  - BUDGET RATING TIPS
  - MAKING FUNDING RECOMMENDATIONS

# CDBG FUNDING LEVELS

Montgomery County has received CDBG funding for over 40 years. During this period, the amounts received have fluctuated, but over the last 4 years it has been fairly stable.

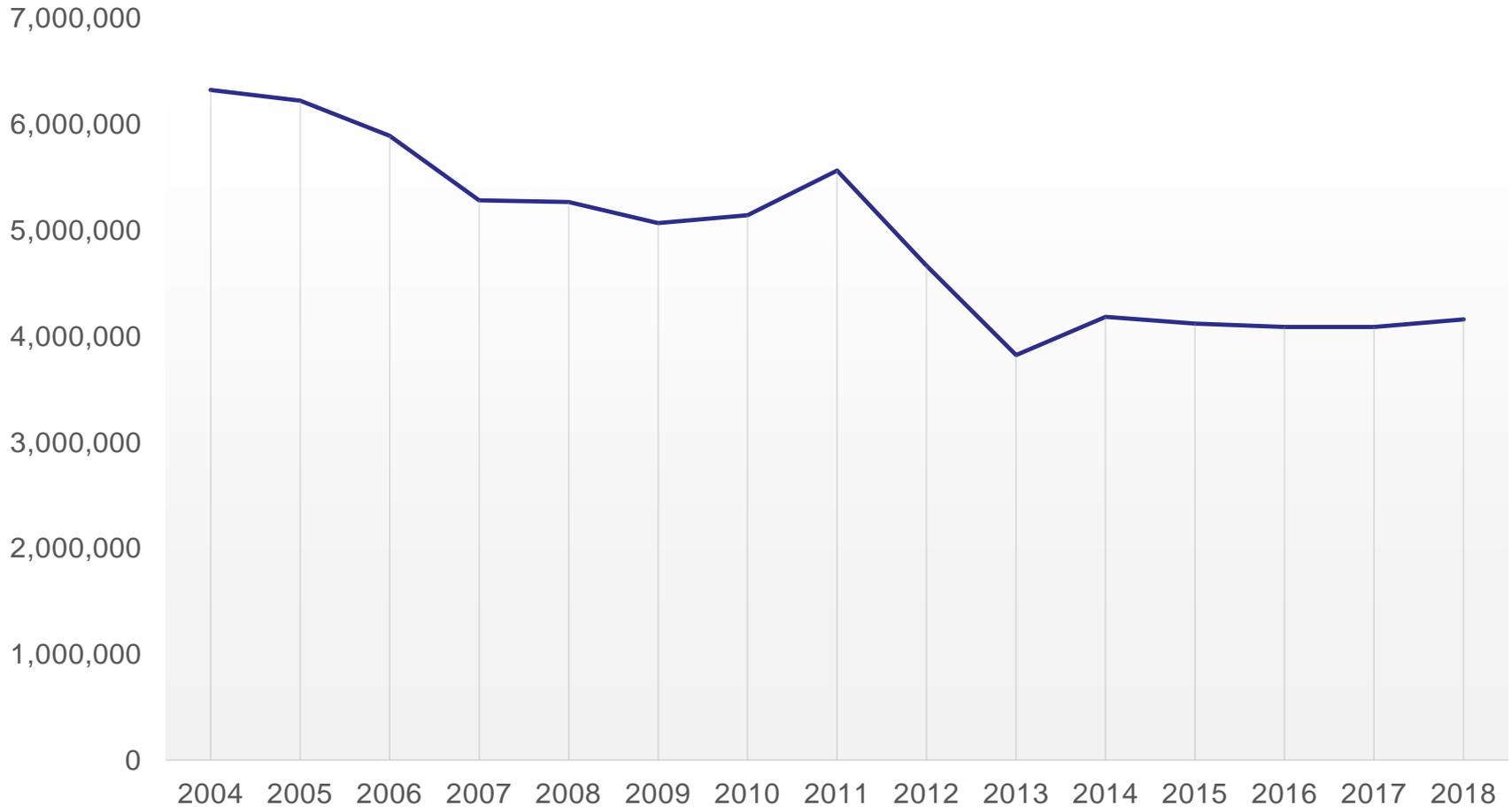
Last year, in FY 2018, we received approx. \$4.1m.

For planning purposes we have estimated FY19 funding as at the same level as FY18.

It is possible this amount may be further reduced when we receive the final allocation amounts.

Therefore it is critical that applications be ranked in such a manner as to easily accommodate possible reductions.

# CDBG ALLOCATION HISTORY



# **THE NUMBERS** 1 of 4

- **TOTAL APPLICATIONS RECEIVED – 36**
- **TOTAL ELIGIBLE APPLICATIONS – 36\***

**\*1 APPLICATION PENDING CORPORATE  
GOOD STANDING WITH MARYLAND DEPT.  
OF ASSESSMENT AND TAXATION**

# THE NUMBERS 2 of 4

- MONTGOMERY COUNTY ANTICIPATES RECEIVING **\$4.1m** CDBG for FY2019

MAXIMUM PUBLIC SERVICE (15% X \$4.1m) =	\$615,000
Less TAKOMA PARK AND ROCKVILLE	<u>- 53,000</u>
Total Available for County	\$562,000
Retained for internal contingency	<u>- \$22,000</u>
Available for Subcommittees	\$540,000
AVAILABLE FOR EACH SUBCOMMITTEE	<b>\$180,000</b>

# THE NUMBERS 3 of 4

- Possible changes in funding
  - If CDBG award is less than anticipated, each subcommittee's funding amount may be reduced accordingly
  - If significant program income is received each subcommittee's funding amount could be increased by a commensurate percentage
  - Therefore, application ratings and funding recommendations must be accurately quantified and documented so that changes may be implemented equitably.

# THE NUMBERS 4 of 4

Number of eligible applications presenting: **36**

Total funds requested: **\$1,350,331**

(Currently available funds represent 41% of total amount requested)

# SUBCOMMITTEE MEETINGS

## HOW MANY TIMES DOES EACH SUBCOMMITTEE MEET?

This is a matter of the preference of each subcommittee's members.

The available meeting dates have been provided.

Each presentation takes about 30 minutes.

Committees can choose to hear as many or as few presentations each night as they wish.

Subcommittees generally choose to hear 3 or 4 presentations each evening.

# PRESENTATION FORMAT (1/2)

## WHAT HAPPENS AT THE PRESENTATIONS?

**Each applicant gives a maximum 5 minute introductory presentation of the high points of their project.**

**The subcommittee then has a 15 to 20 minute question and answer session.**

**The remaining 5 to 10 minutes are for the members to discuss the application among themselves and preliminarily rate it. The group may elect to do this at the end of the evening instead.**

# PRESENTATION FORMAT (2/2)

## WHAT HAPPENS AT THE PRESENTATIONS?

**It's important for all members to have read the application beforehand so the presenter can provide information not included in the application.**

**Staff will monitor time. It's critical to remain on schedule 1) for efficiency and 2) to keep a level playing field for all presenters.**

# **SCHEDULING PRESENTATIONS**

**Staff will schedule the presentation times with the applicants.**

**If an applicant misses or cancels the presentation the subcommittee has the option to permit the applicant to schedule another time if members choose to. This is not required.**

# **APPLICANT RATING SHEET**

- **The Rating Sheet has 5 categories of rating criteria:**

**SCOPE OF WORK**

**BENEFIT TO PERSONS IN NEED**

**LEVERAGING**

**ORGANIZATIONAL CAPACITY**

**BUDGET**

# **RATING CRITERIA**

**Questions and Information included on the Rating Sheet under “Considerations” are intended as a guide; it is not expected that every applicant will specifically address every question or that CDAC members are expected to find out all the answers.**

# SCOPE OF WORK

The **Scope of work** should describe the activities that would be included in a contract with the county. From the information provided you should be able to tell exactly **what** the applicant proposes to do and **how to quantify** whether, and to what extent, the effort is successful. You will be considering the likelihood of success based on what the applicant is proposing.

# BENEFIT TO PERSONS IN NEED

All applicants must directly serve low- and/or moderate income Montgomery County residents. This section asks you to rate the benefit of the proposed services by looking at **who** is being served, **the level of service** to be provided and whether or not the service will result in a **long-term benefit**. The Applicant must be able to describe specifically how the eligibility will be verified and documented.

# LEVERAGING

Montgomery County's policy is generally to award funds for **no more than 3 years** for the same project. Therefore, applicants' abilities and efforts to identify other funding sources is essential if their programs are to be ongoing. You should consider this potential for leveraging when you review applications.

# ORGANIZATIONAL CAPACITY

This section asks you to rate an organization's capacity to "get the job done." Has the organization demonstrated convincingly that it can provide the proposed services effectively?

# BUDGET

The Budget section is designed to both provide a detailed description of exactly what the applicant will spend, **and on what**, to deliver the services. It should be able to be included in a contract with the county with minimal revisions.

This is the most critical element of the application.  
Unlike the questions on the other sections of the Rating Sheet which are general suggestions, all the questions on the separate 2-page “Budget Review Considerations” should be explored.

# FILLING OUT REVIEW SHEET (1/2)

- You will be provided with blank Review Sheets that you may use to make notes when you review individual applications.
- Please bring your review sheets with any comments you made when reading the applications to the presentation and use them to make notes during the presentations.
- You should fill in a value for each of the categories immediately after each presentation while it is still fresh in your mind.

# FILLING OUT REVIEW SHEET (2/2)

- Remember, you can change the values you have given at any time until the final subcommittee meeting
- At the final subcommittee meeting for each group you will make final recommendations for each applicant after hearing all the presentations your committee and arrive at a consensus about who to fund and for how much.

# DETERMINING FUNDING LEVELS

There are many more worthy applicants than there are funds available. You can recommend partial, full or no funding for applicants, but please consider:

- It is essential that a partially funded applicant have adequate “critical mass” to deliver services. If additional funding is necessary to deliver the services, you should be certain the applicant will have access to it.
- Specific CDBG reporting and administrative requirements can be time consuming. Please be sure you will not add undue administrative work to a partially funded applicant for a negligible amount of money.

# WHAT NOW?

- Please convene with your assigned subcommittee.
- Select a subcommittee chairperson.
- Review your application summary sheet and have people volunteer to be the “point person” for each
- The point person should thoroughly study the application before the presentation and conduct the initial questioning.
- The other subcommittee members should follow up with any remaining questions.