



FY 2015-16 OUTSIDE AGENCY ORIENTATION & OVERVIEW SESSION

**Orange County
Town of Carrboro
Town of Chapel Hill**

Updated September 30, 2014

AGENDA

- Welcome & Introductions
- Overview of Application Package
- Application Submission Process
- Evaluation Processes
- Questions/Wrap-Up



OVERVIEW OF APPLICATION PACKAGE

1. Funding Application

- I. Agency & Program Overview
- II. Program Results
- III: Program Budget
- IV: Program Statistics & Cost
- V: Program Beneficiary Demographics
- VI: Comparative Budget for Entire Agency
- VII. Schedule of Positions

2. Supplemental Forms

- Federal Tax Information
 - Tax ID number, Form 990, tax exemption verification, etc.
- Financial Audit
- Proof of Required Minimums for Liability Insurance
- Refer to Application Checklist for a complete list of documents.

ALL OF PARTS 1 & 2 DUE
FRIDAY, JANUARY 23, 2015, AT 5PM



APPLICATION HIGHLIGHTS

○ Funding Application

- Program and Agency Budgets
 - Funding Increase/Decrease Request - Explanation
 - MS Excel Forms – Do not modify form template
- S.M.A.R.T. Goals
- Units of Measures

○ Supplemental Materials

- Contracts Process/Liability Insurance
- Valid form dates, how to obtain documents
- Alternative Audit option if <\$500,000 revenue



S.M.A.R.T. GOALS

- **S**pecific Be specific, clear and concise
- **M**easureable Quantitatively measurable
- **A**chievable Requires effort, but feasible to attain
- **R**elevant Aligned with agency mission
- **T**ime-Bound Deadline driven



PROGRAM UNIT COST

- Section IV, Program Statistics and Costs
- What It Illustrates
 - Allows cost comparisons between different types of services or providers.
 - It is not an isolated measure of cost effectiveness or efficiency.
- Defining a Unit of Service
 - Determined by Section II, Program Results
 - Clearly defined
 - Related to key agency goals and mission



SUBMISSION PROCESS

- **Deadline – Friday, January 23, 2015 at 5:00 p.m.**
 - Entire application – all of Parts 1 and 2.
 - Late Applications
 - Will be marked “LATE”; lateness will impede an application’s internal review process and jeopardize agency funding.

- **Application Submission**
 - Funding Application
 - Electronic: All jurisdictions.
 - Hard copies: Chapel Hill (1 copy plus 1 original) and Carrboro (7 copies plus 1 original).

 - Supplemental Information
 - Electronic: All jurisdictions.
 - Hard copies: Not accepted.

- Request a Delivery Receipt, for electronic submissions, if possible.



APPLICATION REVIEW PROCESS

- Joint application process
- Separate review and funding approval processes, for each jurisdiction
- Reviewing agencies advise, only
 - Funding Recommendations – County/Town Managers
 - Final Funding Decisions – Elected Boards



REVIEW PROCESS: ORANGE COUNTY

- Initial Review
 - Advisory Boards and Committees
 - Finance and Administrative Services
- County Manager
 - Manager's Recommended Budget (Mid-May)
- Board of County Commissioners
 - Public Hearings, Budget Work Sessions
 - BOCC makes the final funding decision (late-June)



REVIEW PROCESS: TOWN OF CARRBORO

- Initial Review
 - Town of Chapel Hill and Town of Carrboro Human Services Advisory Boards

- Carrboro Human Services Advisory Board Develops Funding Recommendations

- Carrboro Board of Aldermen
 - Public Hearing
 - Board of Aldermen make the final funding decision (June)



REVIEW PROCESS: TOWN OF CHAPEL HILL

○ Initial Review

- Town of Chapel Hill and Town of Carrboro Human Services Advisory Boards

○ Town Manager

- Manager's Recommended Budget

○ Chapel Hill Town Council

- Public Hearings, Budget Work Sessions
- Town Council makes the final funding decision (June)



CONCLUSION

- Final Comments and Agency Questions
- Application
 - Deadline: **Friday, January 23, 2015 at 5:00 pm**
 - Websites: www.orangecountync.gov/hsa and www.townofchapelhill.org/hsgrants
- Contact Information

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|---------------------|-------------------|--------------------------------------------------------------------------------------|----------------|
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