

Partner Agency  
Funding Request  
Evaluation Process

The following evaluation process for partner agency funding requests has been outlined to create a system to assure Stafford County staff is making informed unbiased recommendations to the Stafford County Board of Supervisors. These recommendations shall uphold the mission and values adopted by Stafford County and the Board of Supervisors.

The process details requirements that must be met by the agency requesting funding as well as required documentation to ensure County staff has sufficient data to make informed recommendations.

The process is as follows:

- I. The application for funding for partner agencies must be completed and submitted to the Stafford County Budget Department within the provided timelines.
- II. All required attachments to the application must also be submitted for the application to be considered. Documents that must be attached included the following:
  - IRS tax determination letter 501 (c) (3)
  - The agency's latest audit report (including auditor management letter)
  - Most recent un-audited financial statement
  - Most recent IRS tax form 990
  - Name and address of accountant
  - Organizational chart with key personnel and their titles
  - The agency's present Board of Directors, with mailing addresses
  - Copy of the minutes of the Board of Directors meeting when the funding request for the agency was approved
- III. The partner agency must provide any additional information requested by County staff within the provided timelines.
- IV. A committee of County staff will review all submitted applications and will follow specific goals and objectives as outlined within the process.

- V. Once the committee has reviewed all submitted requests a recommendation will be submitted for review to the County Administrator by the Assistant to the County Administrator for Human Services.
- VI. Upon review of the County Administrator the recommendation will be submitted to the Budget office for inclusion during the budget process for the Board of Supervisors.

### Role of a committee member

1. As a committee member you are helping to ensure that County money is allocated wisely and that the health and human needs of the Stafford community are being met professionally and responsibly.
2. Your goals and objectives are to gain a clear, unbiased, understanding of the agency's mission, funded programs, financial situation and capabilities. To achieve this you must perform a review of the agency on the following three dimensions:
  - Agency governance- clearly defined and adhered to strategy and business objectives that ensure the agency has adequate resources to meet its objectives and to ensure it operated an effective risk management system, to monitor its performance and ensure that it acts ethically and meets its responsibilities to its stakeholders.
  - Program performance- how does the program measure its success, how does the program define the indicators that measure the outcomes to show success- is it a measurable indicator? What are the methods of collecting information to determine the level of achievement of the outcome? How does the mission of the program fit within the County's mission?
  - Financial Stewardship- how does the program manage its finances and how does it allocate its resources to meet the mission critical needs and priorities.
3. Recommend funding amounts that reflect:

- The findings of the review
- Stafford County's current fiscal year allocation budget
- Impact of service to Stafford residents
- Priority of community needs- as perceived by committee

Your tasks will include:

- Read and evaluate the content of each agency funding application (a compilation of data will be provided for your review)
- Formulate an initial assessment of each agency related to the two dimensions described above- agency governance, program performance.
- Develop a list of questions for discussion among the other committee members.
- Assess if and how much the agency duplicates services provided by another agency.
- Complete the partner agency review sheet ( this is done during our meeting as a group)