COMMUNITY RELATIONS COMMISSION

PLANO MUNICIPAL CENTER

1520 K AVENUE

October 29, 2019

ITEM NO.	EXPLANATION	ACTION TAKEN
	5:00 p.m. - Dinner – Building Inspections Conference Room	
	5:30 p.m. - Regular Meeting – Building Inspections Training Room	
1	Call to Order/Pledge of Allegiance	
2	Comments of Public Interest: This portion of the meeting is to allow the public to speak on items of interest or concern. It is not for the purpose of speaking on items that are on the current agenda. The Commission may not discuss these items, but factual or policy information may be provided in response to the comments, and the Commission may choose to place the item on a future agenda. Comments are limited to three (3) minutes per speaker, with a maximum time limit of fifteen (15) minutes for this portion of the meeting. Speakers will be notified when speaking time has expired.	
3	Approval of Minutes from the July 25, 2019 Meeting	
4	Review and Comment on the 2019 Grant Process and Direction for the upcoming 2020 Grant Process including Applications and Supporting Documents	
5	Items for Future Agendas	
	Council Liaisons:	
	Deputy Mayor Pro Tem Anthony Ricciardelli and Council Member Maria Tu	

	ACCESSIBILITY STATEMENT Plano Municipal Center is wheelchair accessible. A sloped curb entry is available at the main entrance facing Municipal/L Avenue, with specially marked parking spaces nearby. Access and special parking are also available on the north side of the building. Requests for sign interpreters or special services must be received forty-eight (48) hours prior to the meeting time by calling the Neighborhood Services Department at (972) 208-8150.	

I certify that the above notice of meeting was posted on the bulletin board in the Municipal Center, 1520 K Avenue, Plano, Texas on the 23rd day of October 20 19, at 5:00 o'clock. p.m.

_____
Asst. City Secretary

COMMUNITY RELATIONS COMMISSION MEETING MINUTES
July 25, 2019

COMMISSIONERS PRESENT

Judy Drotman, Chair
Kimberly O'Neil, Vice-Chair

Karen Bellessa
Kate Garrison
Johnny Tseng
Salim Virani

COMMISSIONERS ABSENT

Cynthia Moore
Donna Straker

STAFF PRESENT

Shanette Eaden, Housing and Community Services Manager
Natalie Evans, Grants Analyst
Yoko Mizuta, Sr. Administrative Assistant

The meeting was called to order by Chair Judy Drotman in Building Inspections Training Room, 1520 K Avenue at 5:34 p.m., Thursday, July 25, 2019. A quorum was present.

Vice-Chair Kimberly O'Neil arrived at 5:42 PM.

COMMENTS OF PUBLIC INTEREST

There were no public comments.

APPROVAL OF MINUTES

Commissioner Karen Bellessa made a motion to approve the May 16, 2019, Community Relations Commission meeting minutes. Commissioner Kate Garrison seconded the motion, which passed 6-0.

AGENDA ITEM NO. 4
REVIEW AND DISCUSSION OF THE COLLIN COUNTY 2019 ANNUAL "POINT IN TIME" HOMELESS CENSUS

Natalie Evans, Grants Analyst, presented an overview of the 2019 Homeless Census held on January 24, 2019. Results of the Census in the City of Plano and across Collin County were presented and discussed by the Commission and staff. The Census was organized by the Collin County Homeless Coalition (CCHC), and the cities of Plano, Allen, Fairview, Frisco, McKinney, and Wylie were participated.

AGENDA ITEM NO. 5
REVIEW AND COMMENT ON THE 2019 GRANT PROCESS AND DIRECTION FOR UPCOMING 2020 GRANT PROCESS INCLUDING APPLICATIONS AND SUPPORTING DOCUMENTS

Shanette Eaden, Housing and Community Services Manager, began by directing the Commissioners to the list of discussion items. Each Commissioner provided their comments on the 2019 grant process and shared ideas for the 2020 grant process, which were the following:

- Adding questions to the grant applications to describe efforts to outreach to disability and different ethnic populations, and those questions will be taken a part of the package of questions.

- Requiring to submit an additional Profit and loss statement from the beginning of the fiscal year prior to a one-month application due date.

- For consideration for funding, the minimum score should be 75% of the rubric.

These recommendations will be delivered to the subcommittee for consideration. Commissioners Garrison and Tseng requested to participate on the subcommittee. An additional meeting date will be proposed to allow the Commission to discuss recommendations proposed by the subcommittee before the October meeting. Staff will email Commissioners to establish subcommittee meeting date.

AGENDA ITEM NO. 6
CITY OF PLANO INTERNAL PROGRAM FUNDING

This agenda item will be discussed in a future meeting.

AGENDA ITEM NO. 7
ITEMS FOR FUTURE AGENDAS

There being no items for future discussion, Commissioner Bellessa made a motion to adjourn the meeting. Commissioner Garrison seconded the motion, which passed 6-0. Chairman Drotman adjourned the meeting at 7:53 p.m.

_____
Community Relations Commissioner

CITY OF PLANO

COMMUNITY RELATIONS COMMISSION

October 29, 2019

Agenda Item No. 4

Review and Comment on the 2019 Grant Process and Direction for the Upcoming 2020
Grant Process including Applications and Supporting Documents

DESCRIPTION:

The Community Relations Commission (CRC) will discuss the 2019 grant process and
review subcommittee recommendations for changes to the upcoming 2020 grant process
and related supporting documents.

REMARKS:

The Application Subcommittee of the Commission met on October 16, 2019, to review
aspects of the 2019 Consolidated Grant Application process, per direction provided at the
July 25, 2019 CRC meeting. The subcommittee will present their recommendations to the
Commission for approval. Their recommendations are attached.

RECOMMENDATIONS:

Staff recommends the Commission review and discuss, as well as make final
determinations on changes for the upcoming 2020 consolidated grant application
process.

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CRC Application Subcommittee Recommendations October 16, 2019

The below bolded items are areas that the subcommittee reviewed and provided recommendations for the purpose of improving the 2020 Consolidated Grant Process.

I. **Writing a question that allows applicants to describe outreach to the disabled community.**

   The subcommittee met and recommends adding the below question to the grant application:

   > "Describe your methods of outreach to underserved communities, including but not limited to people with disabilities, minority populations, and other distinct groups."

II. **Determine whether the minimum application score for funding consideration should be increased form 70% to 75%**

   The subcommittee recommends keeping the minimum application score for funding consideration at 70%.

III. **Looking at the submittal of additional financial documentation to assist in providing a more up-to-date snap shot of the applicant**

   The subcommittee recommends adding the following attachment to be added to the list of required attachments:

   "Copy of your organization's Profit & Loss Statement for the Trailing 12 Month period ended February 2020. As example, the P&L for February 2020 would cover 3/01/2019 through 2/28/2020."

   During the mandatory grant application training, staff will clarify that the P&L for the trailing 12-month ending on the most recently – available month should be submitted. It was determined that this consideration is already covered in an existing question.

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2019 Consolidated Grant Application
Community Relations Commissioner Rubric

The below rubric is based on a maximum 100 points that may be awarded to an application submitted through the City of Plano Consolidated Grant Process.

Written Application Rubric (Total value 55 points)

1. Application Quality (5 points)

Review Criteria: Applications will be assessed based on the organization of information, accuracy, cohesiveness, consistency, and clarity of the submission.

2. Project Description and Need (10 points)

Review Criteria: Applications will be assessed based on whether the program/project meets a specific need within the City of Plano. Applicants are encouraged to include the following within their responses:

1) Justify how they determined the need and solution within Plano;

2) Compare their solution to others serving the City of Plano and explain their key differentiation(s); and

3) Explain how their program/project addresses a priority within the City of Plano and aligns with goals outlined in the Consolidated Plan and Annual Action Plan.

3. Capacity to Manage Programs (10 points)

Review Criteria: Applications will be assessed based on the applicant's demonstrated ability (finances, staff, program plan, effective board governance, etc.) to support capacity to execute the programs during the grant period for which the funds are being requested.

4. Ability to Serve Plano Residents (5 points)

Review Criteria: Applications will be assessed based on the degree to which the applicant has described how their programs will directly serve and benefit residents within the City of Plano. Applicants are encouraged to reference prior experiences serving residents in Plano.

5. Proposed Outcome Measures (10 points)

Review Criteria: Applications will be assessed based on applicant's ability to provide tangible qualitative and quantitative measures that focus on overall impact and solution solving. While numbers of people served should be included, applicants should also

focus on how those numbers translate into direct and indirect benefits to not only the clients served, but how it impacts community development within the City of Plano.

6. Organizational Finances (15 points)

Review Criteria: Applications will be assessed based on the financial stability of the organization. Financial support and audit information will be cross matched for accuracy and clarity. Information submitted should match the requested information in the application packet. Unless otherwise noted, applicants should be sure to provide financial information in accordance with their fiscal year as reported to the IRS. Organizations who do not have required financial documents as requested in the application instructions should include a statement explaining why the information is not available.

Public Hearing Rubric (Total value 30 points)

7. Did the speaker answer the public hearing questions in the allotted time? (5 points)

Review Criteria: Each applicant will be allotted 5 minutes to provide a prepared presentation to the Community Relations Commission. Applicants will be rated based on their ability to respond to the questions outlined in the Public Hearing Questions document within the application packet. Applicants are asked to answer the questions in detail and in the order listed.

8. Was the speaker able to answer staff questions in the allotted time? (5 points)

Review Criteria: Each applicant will be provided with a City of Plano Staff Evaluation in advance of the public hearing. If the evaluation includes any questions or concerns, the applicants will be provided with an additional 2 minutes to provide a prepared statement to address them. This time can only be used to address the staff evaluation.

9. Were the project needs and impacts understandable? (5 points)

Review Criteria: Each applicant will be rated based on their ability to articulate their project needs and impact to the City of Plano. Applicants are encouraged to use the public hearing time to highlight and enhance content provided in the written application.

10. Was the speaker able to clearly answer Commission questions? (5 points)

Review Criteria: Each Commissioner will be allotted 3 minutes to ask each applicant questions and receive their responses following their public hearing presentation. Applicants will be rated on their overall ability to answer questions asked by the Commissioners.

11. Was the speaker knowledgeable? (5 points)

Review Criteria: Each applicant will be rated on their ability to convey the program/project details during the public hearing presentation, as well as how it relates to the mission of their organization and the needs within the City of Plano.

12. Did the public presentation content match or enhance the content presented in the written application? (5 points)

Review Criteria: Each applicant will be rated based on the consistency of information provided during the public hearing presentation as compared to that which was provided in the written application.

Administrative/Staff Rubric (Total value 10 points for New Applicants and 15 points for existing applicants)

13. Application Quality (5 points)

Review Criteria: Question number six of the Staff Evaluation will be reviewed to determine points given under this area. Each application starts out with 5 points and then 1 point is deducted for every two staff written comments, indicating an error between the application question and written response provided by the applicant.

14. Previous Contract Performance – Prior Grant Recipients ONLY (5 points)

Review Criteria: This question is ONLY for applicants that have been awarded grant applications in the most recently completed consolidated grant year. The past four quarterly reports submitted will be given a maximum score of five points. Then an average of those points will be provided for this section.

For the purpose of this section, untimely is defined as a quarterly report being submitted after the due date or submission of corrections to a previously submitted quarterly report more than two weeks after the initial staff request.

Points are assessed as follows:

1) If no errors exist on the quarterly report and it was submitted on time, 5 points will be provided;

2) If they had errors, but it was timely, 4 points will be provided;
3) If no errors but the report was not timely, three points will be provided.

4) If there were errors and the report was not submitted timely, two points are awarded.

15. Consolidated Plan Outcomes (5 points)

Review Criteria: Each application will be evaluated as to whether their program meets a 2015-2019 Consolidate Plan Outcome. Applications meeting a consolidated Plan

outcome will receive 5 points. Applications that do not meet a specified Consolidated Plan outcome but still provide a public service for Plano residents will receive 2 points.

Funding Recommendation Deliberations Rules

• Staff will present the Commission with a completed funding spreadsheet as a discussion starter based on the total score using the below threshold percentages:

➢ 70-74: 50% of funding request
➢ 75-79: 60% of funding request
➢ 80-84: 70% of funding request
➢ 85-89: 80% of funding request
➢ 90-94: 90% of funding request
➢ 95 and above: 100% of funding request

• Percentage numbers for the overall application score is based on Raw Average Score

• Staff does preliminary funding spreadsheet based on above percentage range
       ➢ If over budget, CRC will reduce funding proportional, across the board.
       ➢ Staff should also include on the funding spreadsheet the percentages reduced.

City of Plano
Neighborhood Services Department
2020 Consolidated Grant Application - Program Support
deadline

Print Preview Prop

Jump to: Pre-Application   Application Questions   Organizational Budget   Tables   Documents

$ 0.00 Requested

Additional Contacts
none entered

printpreview@printpreview.com
Tel:

Pre-Application *top*

Program To Be Funded

1. State the program for which you are requesting City of Plano grant funds.
-no answer-

Organization National Affiliation

2. Is your organization affiliated with a national organization? If yes, state the name of the national organization.
-no answer-

Application Questions *top*

Organizational Overview

1. What is your vision and how does it improve the community?
-no answer-

2. State your organization's mission or purpose in simple terms understandable to the general public.
-no answer-

3. List all of your organization's programs offered locally to clients.
-no answer-

4. Provide a one sentence explanation of the programs listed in Question 3, and the core services offered through each of the programs.
-no answer-

5. State the date and year of the first meeting of the agency's local Board of Directors.
The City requires organizations to be in operation for a minimum of three years prior to the application deadline. The benchmark for operations is established as the first regular meeting of the agency's local Board of Directors.

-no answer-

6. State the beginning month-day and ending month-day of your organization's fiscal year as reported to the IRS.
MM/DD/YY - MM/DD/YY
-no answer-

7. What fiscal year is represented with the organization's audit included as an attachment with this grant application?
Any organization that has conducted an annual audit of its most recently completed fiscal year is required to attach said audit.
-no answer-

8. Provide the percent of funds used for administrative and fundraising functions by your organization for the last audited fiscal year (i.e. your indirect cost rate).
-no answer-

9. Briefly explain your organization's use of volunteers across all programs (e.g. hours per week, volunteers per year, etc.).
-no answer-

Program to be Funded

10. Name the program listed in Question 3 for which you are requesting funding and describe it in as much detail as possible in the space provided below.
Each organization is asked to define concisely who, what, when, where, and how of the specific program for which funding is requested.
-no answer-

11. Describe in detail all client eligibility/qualification requirements to participate in the program which funds are being requested for as in the following areas:1) Age, 2) Gender, 3)Geographic, 4) Circumstantial, 5) Income, or 6) Other.
Please list any disqualifying factors that limit service to your program, including both objective and subjective determinations. [Example: 1) Age-None, 2) Gender-Woman Only, 3)Geographic-None, 4)Circumstantial-Court Referral Only, 5) Income-None]
-no answer-

12. Describe the 1) Day(s) and 2) Time(s) the program is offered.
-no answer-

13. Describe the location where the program services are offered (Address and Facility Description).
-no answer-

14. List the following for each employee working in the program: 1) Position Title, 2) Whether the position is Full-time or Part-time, 3)Minimum qualifications for the position, and 4)Percentage of time the position spend working on the program.
[Example 1: Case Worker, full-time, Bachelor of Arts in Social Work, 50% Example 2: Accountant, part-time, CPA license, 25%]
-no answer-

Program Client Income and Definition

15. Does your organization verify client income?
- ∈ YES
- ∈ NO

16. If Yes, provide the percentage of low/moderate income clientele served by the program requested (see Grant Activity Eligibility Rules) and a brief description, If No, estimate the percentage of low/moderate income clientele served by the program.
Describe what documentation the organization collects to determine the income status of the clientele served including but not limited to pay stubs, tax forms, sworn statements, photo I.D., etc. If no such documentation is secured, please write none

-no answer-

17. Does your organization collect clientele fees from program participants? YES or NO. If yes, does your program

subsidize low-to-moderate income clients receiving services? How and in what proportion relating to the total clientele served?

-no answer-

18. For reporting purposes for this program, clients are tracked as (check ONLY ONE of the following): Individuals, Families, or Households

Please refer to the Grant Activity Eligibility Rules in the Library Tab for a definitions of individual, family and household.

- ⊝ Individuals
- ⊝ Families
- ⊝ Households

Programmatic Financial Explanations

19. Does your agency have board-approved internal controls? If yes, can you provide a copy to the City of Plano upon request?

-no answer-

20. Explain any changes in service level or program cost between the three program years noted in the Programmatic Table 1:Costs per Clients Served Table.

-no answer-

21. Compare the Program Specific Financials Table 1: Program Revenues Table with the totals in Program Specific Financials Table 3: Program Expenses Table. Explain any significant program revenues and expenses differences, either excess or deficiency.

-no answer-

Program Measurable Goals

22. Has your organization adopted one or more measurable goals for the services provided by the program for which you are requesting funding? If so, what are they?

Note: Goals must be numeric. [Example: Clients avoid homelessness for at least three months]

-no answer-

23. What are the tools your organization uses to measure the level of achievement set by these measurable goals?

[Example: Excel database, Quick Books, other software driven databases etc.]

-no answer-

24. Based on your organization's most recently completed fiscal year, what specific outcomes are derived from stated measurable goals and supported by appropriate tools to reflect the effectiveness of this program?

-no answer-

25. If your organization has not adopted measurable goals for the program for which funds are requested, on what basis do you consider the program a success? Does your organization plan to adopt measurable goals for the program requested for funding?

-no answer-

Plano Community Need

26. Is this program unduplicated within the city of Plano?

Answer "yes" if either the service or target population is unique.

-no answer-

27. Why does Plano need the services your organization's program provides? Explain your program's impact on Plano residents. How are you helping to decrease the problem that your program is addressing?

Provide only local and county, rather than national or state-wide statistics and other related information to explain the need. Explain how your program is unique.

-no answer-

28. Do you acknowledge that any funding received must be used to benefit only City of Plano residents?

- ⊝ YES

∈ NO

29. Describe the outreach process, recipient selection process (if applicable) and accessibility of your organization to targeted Plano clientele.
-no answer-

Supporting Information

30. a) Describe your organization's effort and successes in securing volunteer time, donated materials and/or equipment to support this program, and b) describe how your organization utilizes its board of directors to enhance the impact of this program
In as much detail, yet concisely, answer both A and B inquiries.
-no answer-

31. Are you collaborating with other organizations that serve Plano residents?
∈ Yes
∈ No

32. If your response to Question 31 is "Yes," explain how you are collaborating with other Plano organizations.
Type "N/A" if you answered "No" to Question 31.
-no answer-

33. List only those community partnerships that specifically will help support this program in terms of reaching more clientele and in terms of optimizing funds provided [Ex. clientele referral from other organizations; donations of materials/supplies]
-no answer-

34. If the funds your organization is requesting will not be spent equally across the grant's fiscal year, provide the anticipated schedule for, and the events that trigger the disbursement of funds.
-no answer-

35. State the number of clients served by the program for which your organization is requesting funds.
Refer to Question 18 to determine if your agency reports individuals, families, or households.

	Actual served in Grant Year 2018
	Projected served in Grant Year 2019
	Budgeted to serve in Grant Year 2020
0.00	**TOTAL**

36. State the number of PLANO clients served by the program for which your organization is requesting funds.
Refer to Question 18 to determine if your agency reports individuals, families, or households.

	Actual served in Grant Year 2018
	Projected served in Grant Year 2019
	Budgeted to serve in Grant Year 2020
0.00	**TOTAL**

37. What do you consider a unit of service for the program? On average, how many units does each client receive?
-no answer-

38. Describe your methods of outreach to underserved communities, including but not limited to people with disabilities, minority populations, and other distinct groups.
-no answer-

Organizational Budget *top*

Organization Revenues	Two Years Prior	Previous Fiscal Year	Current Fiscal Year
-none-	$ 0.00	$ 0.00	$ 0.00

Organization Expenses	Two Years Prior	Previous Fiscal Year	Current Fiscal Year
-none-	$ 0.00	$ 0.00	$ 0.00

Tables *top*

Programmatic Impact Table 1: Costs Per Clients

	Grant Year 2018 Actual (10/18 - 9/19)	Grant Year 2019 Projected (10/19 - 9/20)	Grant Year 2020 Budget (10/20 - 9/21)
Overall program cost			
Total unduplicated clients/households (as defined in question #35 in the Application Questions tab)			
Unduplicated Plano clients/households (as defined in question #36)			
Total			

Programmatic Impact Table 2: Number of Clients Fully Paid for with Grant Amount Requested

City of Plano Grant Amount Requested as noted in the Summary Section of this application	
Un-duplicated clients (as defined in Question 36) who live in Plano that will be served with the Grant Amount Requested	
Total	

Program Specific Financials Table 1:Projected Program Revenue Budget

Program Specific Revenues	Amount
Clientele	
Fees	$
Contracts	
Total Contracts	$
Contributions	
Individuals	$
Corporations & Foundations	$
United Way	$
Fundraising	$
Program Specific Grants	
Federal	$
State	$
Municipal	$
Collin County	$
Plano Independent School District	$
Other Grants	
	$
	$
	$
Miscellaneous	
	$

	$
	$
	$
	$
	$
	$
	$
	$
	$
Total	**$ 0**

Program Specific Financials Table 2: Grants Requested/Received

Funding Source	Amount Requested	Date Grant Submitted (mm/dd/yyyy)	Pending?	Received?	Denied?
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
Total	**$ 0**	**0**			

Program Specific Financials Table 3: Program Expense Budget

Program Expenses	City Funding Request Narrative	Other Funds	Total Expenses
PROGRAM SUPPORT EXPENSES-ONLY FOR PROGRAM SUPPORT APPLICANTS			
PERSONNEL			
Salaries/Benefits	$	$	$ 0
OPERATIONAL			
Supplies	$	$	$ 0
Materials	$	$	$ 0
Office Equipment	$	$	$ 0
Transportation	$	$	$ 0
Organization Dues	$	$	$ 0
Organizational Insurance	$	$	$ 0
Professional Services	$	$	$ 0
OCCUPANCY			
Facility Mortgage/Rent	$	$	$ 0
Utilities	$	$	$ 0
Facility Insurance	$	$	$ 0
Maintenance	$	$	$ 0
MISCELLANEOUS			
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$

	$	$	$
	$	$	$
	$	$	$
Total	**$ 0**	**$ 0**	**$0**

Documents *top*

Documents Requested *	Required?	Attached Documents *
Attachment 1: Detailed Annual Organization Budget for the Current Year	✔	
Attachment 2: List of officers and member of the board of directors for the organization, include (1) The City in which they live, (2) Professional affiliations and employers, (3) Race, and (4) Ethnicity (Hispanic or Non-Hispanic)	✔	
Attachment 3: The current annual schedule of board meetings	✔	
Attachment 4: Resumes of both the director of the organization and director of the program for which funds are being requested. The organization Director is the Chief Executive Officer. The program director is who directly manages daily operations.	✔	
Attachment 5: A copy of the organization's latest tax return accepted by the Internal Revenue Service (typically on Form 990 or PF-990)	✔	
Attachment 6: One copy of the organizations' IRS letter of determination	✔	
Attachment 7: Copy of the Texas Secretary of State Franchise Tax Account Status printed in 2019	✔	
Attachment 8: Completed Audit Information Certification Form	✔	
Attachment 9: Copy of your organization's most recent audit of financial records	✔	
Attachment 10: Copy of the organization's management letter, recommendation letter or any other document from the auditor commenting on your organization's financial controls.	✔	
Attachment 11: For Program Support applications, a Financial Assistance Program form		
Attachment 12: Copy of your organization's Profit & Loss Statement (also referred to as "P&L"or "Income Statement") for the Trailing 12 Month period ended February 2020. As example, the P&L for Feb 2020 would cover 3/01/2019 through 2/28/20	✔	

* ZoomGrants™ is not responsible for the content of uploaded documents.

Application ID: 124545

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City of Plano
Neighborhood Services Department
2020 Consolidated Grant Application - Housing, Site Improvement, and Public Facility
deadline

Print Preview Prop

Jump to: Pre-Application   Application Questions   Organizational Budget   Tables   Documents

$ 0.00 Requested

Additional Contacts
none entered

printpreview@printpreview.com
Tel:

Pre-Application *top*

Program To Be Funded

1. State the program for which you are requesting City of Plano grant funds.
-no answer-

Organization National Affiliation

2. Is your organization affiliated with a national organization? If yes, state the name of the national organization.
-no answer-

Application Questions *top*

Organizational Overview

1. What is your vision and how does it improve the community?
-no answer-

2. Are you requesting funds for Permanent Housing (includes new construction or housing rehabilitation), Site Improvement (SI), or Public Facility (PF)?
SI directly related to safety, accessibility, and/or catastrophic events. It the funds to repair, refurbish, or relocation of an organization's facility in which services are provided. PF relates directly to building a new facility for public use.
- ⊖ Permanent Housing
- ⊖ Site Improvement
- ⊖ Public facility Construction

3. State your organization's mission or purpose in simple terms understandable to the general public.
-no answer-

4. List all of your organization's programs offered locally to clients.

-no answer-

5. Provide a one sentence explanation of the programs listed in Question 4, and the core services offered through each of the programs.
-no answer-

6. State the date and year of the first meeting of the agency's local Board of Directors.
The City requires organizations to be in operation for a minimum of three years prior to the application deadline. The benchmark for operations is established as the first regular meeting of the agency's local Board of Directors.
-no answer-

7. State the beginning month-day and ending month-day of your organization's fiscal year as reported to the IRS.
MM/DD/YY - MM/DD/YY
-no answer-

8. What fiscal year is represented with the organization's audit included as an attachment with this grant application?
Any organization that has conducted an annual audit of its most recently completed fiscal year is required to attach said audit.
-no answer-

9. Provide the percent of funds used for administrative and fundraising functions by your organization for the last audited fiscal year (i.e. your indirect cost rate).
-no answer-

10. Briefly explain your organization's use of volunteers across all programs (e.g. hours per week, volunteers per year, etc.).
-no answer-

Program to be Funded

11. Name the program listed in Question 4 for which you are requesting funding and describe it in as much detail as possible in the space provided below.
Each organization is asked to define concisely who, what, when, where, and how of the specific program for which funding is requested. For permanent housing programs, do you require homebuyer/homeownership education of your clientele, if so explain.
-no answer-

12. Describe the site improvement or public facility construction project for which funds are being requested. Include the services to be provided at the location and the site address.
-no answer-

13. Describe how the site improvement or facility construction will enhance program(s) offered by the organization.
-no answer-

14. Check all of the activities that may be included in your Plano program in 2019.
- ⊜ Acquisition of infill lots
- ⊜ Acquisition of existing houses
- ⊜ Demolition
- ⊜ Rehabilitation of owner-occupied property
- ⊜ Rehabilitation of tenant-occupied property
- ⊜ Rehabilitation of unoccupied property
- ⊜ New construction
- ⊜ Downpayment/Closing costs to homebuyer
- ⊜ Equity subsidy to homebuyer
- ⊜ Site preparation
- ⊜ Acquisition of land for a public facility
- ⊜ Rehabilitation of an existing public facility
- ⊜ Other:

15. Describe in detail all client eligibility/qualification requirements to participate in the program which funds are being requested for as in the following areas:1) Age, 2) Gender, 3)Geographic, 4) Circumstantial, 5) Income, or 6) Other.
Please list any disqualifying factors that limit service to your program, including both objective and subjective determinations. [Example: 1) Age-None, 2) Gender-Woman Only, 3)Geographic-None, 4)Circumstantial-Court Referral Only, 5) Income-None]
-no answer-

16. Describe the 1) Day(s) and 2) Time(s) the program is offered.
-no answer-

17. Describe the location where the program services are offered (Address and Facility Description).
-no answer-

18. List the following for each employee working in the program: 1) Position Title, 2) Whether the position is Full-time or Part-time, 3)Minimum qualifications for the position, and 4)Percentage of time the position spend working on the program.
[Example A: Case Worker, full-time, Bachelor of Arts in Social Work, 50% Example 2: Accountant, part-time, CPA license, 25%]
-no answer-

Program Client Income and Definition

19. Does your organization verify client income?
- ∈ YES
- ∈ NO

20. If Yes, provide the percentage of low/moderate income clientele served by the program requested (see Grant Activity Eligibility Rules) and a brief description, If No, estimate the percentage of low/moderate income clientele served by the program.
Describe what documentation the organization collects to determine the income status of the clientele served including but not limited to pay stubs, tax forms, sworn statements, photo I.D., etc. If no such documentation is secured, please write none

-no answer-

21. Does your organization collect clientele fees from program participants? YES or NO. If yes, does your program subsidize low-to-moderate income clients receiving services? How and in what proportion relating to the total clientele served?
-no answer-

22. For reporting purposes for this program, clients are tracked as (check ONLY ONE of the following): Individuals, Families, or Households
Please refer to the Grant Activity Eligibility Rules in the Library Tab for a definitions of individual, family and household.
- ∈ Individuals
- ∈ Families
- ∈ Households

23. Does your agency have board-approved financial controls? If yes, can you provide a copy to the City of Plano upon request?
-no answer-

Programmatic Financial Explanations

24. Compare the Program Specific Financials Table 1: Program Revenues Table with the totals in Program Specific Financials Table 3: Program Expenses Table. Explain any significant program revenues and expenses differences, either excess or deficiency.
-no answer-

25. Explain any changes in service level or program cost between the three program years noted in the Programmatic Table 1: Costs per Clients Served Table.
-no answer-

Plano Community Need

26. Do you acknowledge that any funding received must be used to benefit only City of Plano residents?

- ∈ YES
- ∈ NO

27. Describe the outreach process, recipient selection process (if applicable) and accessibility of your organization to targeted Plano clientele.
-no answer-

28. a) Describe your organization's effort and successes in securing volunteer time, donated materials and/or equipment to support this program, and b) describe how your organization utilizes its board of directors to enhance the impact of this program
In as much detail, yet concisely, answer both A and B inquiries.
-no answer-

29. List only those community partnerships that specifically will help support this program in terms of reaching more clientele and in terms of optimizing funds provided [Ex. clientele referral from other organizations; donations of materials/supplies]
-no answer-

Supporting Information

30. If funds your organization is requesting will not be spent equally across the grant's fiscal year, provide the anticipated schedule for, and the events that trigger the disbursement of funds.
-no answer-

31. Are you requesting CHDO Operating funds?
Applicants must be a certified Community Housing Development Organizations (CHDO) or eligible to qualify as one to request such funds.

- ∈ YES
- ∈ NO

32. Will the organization be financing any portion of the acquisition of a property? If so, explain your procedure for obtaining financing. Will you be partnering with banks, mortgage companies or other for profit organizations?
-no answer-

33. Will the homebuyer obtain permanent financing for the housing? If so, describe the details of the financing. What, if any, restrictions are there on the loan product? Is there a minimum or maximum amount financed?
When describing financing state: Who provides the financing? Do you use preferred lenders?
-no answer-

34. Will you be procuring general contractors for the rehabilitation or building of these projects? If Yes, describe your procurement process. If not, will you be procuring contractors for specific work exceeding $3,000? If yes, describe how?
When describing for procurement process explain the process for approving the general contractors or work specific contractors.
-no answer-

35. If you are requesting $200,000 or more for construction, describe how you intend to meet Section 3 federal requirements. If you are not requesting $200,000, how do you encourage employment opportunities to low income persons.
Please include how you encourage opportunities to businesses that employ low income persons.
-no answer-

36. If your organization is requesting funding for eight (8)+ units (rehabilitation or new construction) or non-residential construction of $2,000+, briefly describe your experience in meeting Davis Bacon and Related Acts (DBRA) federal requirement.
HUD requires compliance with Davis Bacon and Related Acts (DBRA) federal wage requirements for 8 or more units. If you have questions about how DBRA standards impact your construction project, contact the Community Services Division staff.
-no answer-

37. Please describe your procedural documents below including title, description, number of pages, date of

adoption, and frequency of update.
HUD requires all housing programs to have thorough documentation of their operational procedures consistent with Federal regulations; this is also a contract requirement of the City.
-no answer-

Programmatic Outputs and Outcomes

38. Briefly describe how you track your Net Proceeds and on what type of expenses you plan to use these funds.
HUD requires these funds be tracked for one complete cycle, or one time over. These proceeds can only be used for expenses described in your grant agreement.
-no answer-

39. State the number of households served by the program for which your organization is requesting funds.

	Actual served in Grant Year 2018
	Projected served in Grant Year 2019
	Budgeted to serve in Grant Year 2020
0.00	**TOTAL**

40. State the number of PLANO households served by the program for which your organization is requesting funds.

	Actual served in Grant Year 2018
	Projected served in Grant Year 2019
	Budgeted to serve in Grant Year 2020
0.00	**TOTAL**

41. Provide the estimated amount of dollars per household as noted below.

	Estimated cost of project per household
	Estimated City of Plano funds used per household
	Estimated direct subsidy to household (typically difference between market value and cost to client, direct financial assistance, or forgivable loan amount)
0.00	**TOTAL**

42. Indicate which one of the following outcomes your organization's grant will produce. Check only one.

- Availability/ Accessibility: Makes services, infrastructure, housing, and shelter available and accessible. Note- Accessibility does not refer only to physical barriers.
- Affordability: Includes the creation or maintenance of affordable housing, basic infrastructure hookups, or services
- Sustainability: Promotes livable or viable communities and neighborhoods by providing services or by removing slums or blighted areas.

43. Describe your methods of outreach to underserved communities, including but not limited to people with disabilities, minority populations, and other distinct groups.
-no answer-

Organizational Budget *top*

Organization Revenues	Two Years Prior	Previous Fiscal Year	Current Fiscal Year
-none-	$ 0.00	$ 0.00	$ 0.00

Organization Expenses	Two Years Prior	Previous Fiscal Year	Current Fiscal Year
-none-	$ 0.00	$ 0.00	$ 0.00

Two Years Prior	*calculation error*

Programmatic Impact Table 1: Costs Per Clients

	Grant Year 2018 Actual (10/20 - 9/19)	Grant Year 2019 Projected (10/19 -9/20)	Grant Year 2020 Budget (10/20 -9/21)
Overall program cost			
Total Unduplicated clients/households (as defined in question #39)			
Unduplicated Plano clients (as defined in question #40)			
Total			

Programmatic Impact Table 2: Number of Clients Fully Paid for with Grant Amount Requested

City of Plano Grant Amount Requested as noted in the Summary Section of this application	
Unduplicated clients (as defined in Question 40) who live in Plano that will be served with the Grant Amount Requested	
Total	

Program Specific Financials Table 1:Projected Program Revenue Budget

Program Specific Revenues	Amount
Clientele	
Fees	$
Contracts	
Total Contracts	$
Contributions	
Individuals	$
Corporations & Foundations	$
United Way	$
Fundraising	$
Net Proceeds (FOR HOUSING APPLICANTS ONLY)	$
Program Specific Grants	
Federal	$
State	$
Municipal	$
Collin County	$
Plano Independent School District	$
Other Grants	
	$
	$
	$
Miscellaneous	
	$
	$
	$
	$
	$

	$
	$
	$
	$
	$
Total	**$ 0**

Program Specific Financials Table 2: Grants Requested/Received

Funding Source	Amount Requested	Date Grant Submitted (mm/dd/yyyy)	Pending?	Received?	Denied?
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
	$		∈	∈	∈
Total	**$ 0**	**0**			

Program Specific Financials Table 3: Program Expense Budget

Program Expenses	City Funding Request Narrative	Other Funds	Total Expenses
Affordable Housing/Site Improvement/Public Facility Expenses			
Property Acquisition	$	$	$ 0
Construction /Materials	$	$	$ 0
Other Expenses	$	$	$ 0
Operating Expenses			
Personnel	$	$	$ 0
Operation/Occupancy	$	$	$ 0
MISCELLANEOUS			
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
	$	$	$
Total	**$ 0**	**$ 0**	**$0**

Documents *top*

Documents Requested *	Required?	Attached Documents *
Attachment 1:Detailed Annual Organization Budget for the Current Year	✔	
Attachment 2: List of officers and member of the	✔	

board of directors for the organization, include (1)The City in which they live, (2)Professional affiliations and employers, (3) Race, and (4) Ethnicity (Hispanic or Non-Hispanic)	
Attachment 3:The current annual schedule of board meetings	✔
Attachment 4: Resumes of both the director of the organization and director of the program for which funds are being requested. The organization Director is the Chief Executive Officer. The program director is who directly manages daily operations.	✔
Attachment 5: A copy of the organization's latest tax return accepted by the Internal Revenue Service (typically on Form 990 or PF-990)	✔
Attachment 6: One copy of the organization's IRS letter of determination	✔
Attachment 7: Copy of the Texas Secretary of State Franchise Tax Account Status printed in 2019	✔
Attachment 8: Completed Audit Information Certification Form	✔
Attachment 9: Copy of your organization's most recent audit of financial records	✔
Attachment 10: Copy of the organization's management letter, recommendation letter or any other document from the auditor commenting on your organization's financial controls.	✔
Attachment 11: For all Permanent Housing applications, the Underwriting for Appropriations Act of 2012 form	
Attachment 12: For Site Improvement applications, include at least 2 bids	
Attachment 13: Copy of your organization's Profit & Loss Statement (also referred to as "P&L"or "Income Statement") for the Trailing 12 Month period ended February 2020. As example, the P&L ending Feb 2020 would cover 3/01/2019 through 2/28/2020	✔

* ZoomGrants™ is not responsible for the content of uploaded documents.

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