



Policy Type: Board

Category: Fiscal and Budget

Policy Name: Policy Specifying Criteria and Procedures for Processing Off-Cycle Funding Requests from Community-Based Organizations (CBOs) - Board Policy 3.26

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3.26 POLICY SPECIFYING CRITERIA AND PROCEDURES FOR PROCESSING OFF-CYCLE FUNDING REQUESTS FROM COMMUNITY-BASED ORGANIZATIONS (CBOs) (Adopted 12-8-98; Amended 5-25-99)

This policy specifies criteria and procedures to be followed when CBOs (Community Based Organizations) request general fund support outside the Budget Process and months of the year when funding requests are normally given consideration by the Santa County Board of Supervisors. This policy is limited to requests made by CBO's directly to the Board of Supervisors and not through departments. Normal opportunities for funding occur through RFP processes (various months), budget requests sponsored by Board Committees or individual Supervisors (May and June), or at the mid-year budget review (January).

3.26.1 Criteria for Off-Cycle Funding

Four criteria will be utilized when determining whether or not to fund a CBO requesting off-cycle financial support directly from the Board of Supervisors. In order to be considered, a request must meet *all* four criteria, as follows:



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- **Current Contract** - The CBO must have a contract or similar relationship with the County in the current fiscal year;
- **Verifiable Crisis** - The CBO must be on the verge of interruption or termination of services due to a verifiable financial or facility-related crisis;
- **Critical Service** - The CBO must provide a critical service that other similar organizations could not provide without significant difficulty and/or delay;
- **Significant Impact** - Interruption or termination of the services provided by the CBO must have a significant impact on the number of residents affected or the duration of the impact.

3.26.2 Procedures for Use of the Criteria

The CBO's request for funding would be referred to the Finance and Government Operations Committee for evaluation.

If all four criteria are met, the Committee forwards the request to the Board of Supervisors for action, along with a recommendation to grant or not grant the request, accompanied by reasons for the recommended action. Even if the Committee finds that the four criteria are met, it may cite overriding concerns for not granting the request.

If the Committee grants the request, it is the policy of the Board of Supervisors that a repayment plan is developed so the funds can be repaid to the County over a mutually agreeable timeframe.



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The Finance and Government Operations Committee and the Board of Supervisors have the ability, on an exception basis, to provide a grant that does not require repayment if they believe the financial circumstances of the organization in question support such a decision.

If the request fails to meet the criteria, in the opinion of the Finance and Government Operations Committee, the CBO would be notified that its request has been rejected at the Committee level. The CBO would be advised of its right to appeal the Committee's recommendation at a meeting of the full Board of Supervisors.

Upon receiving the Finance and Government Operations Committee's recommendation, and/or upon hearing the CBO's appeal, the Board of Supervisors has three options:

- Grant the request, for the reasons stated (e.g., the extreme urgency of taking this action, which affects large numbers of residents over a significant period of time);
- Deny the request, for reasons stated (e.g., the matter is not urgent enough to take action at this time, and could damage the perception that the Board of Supervisors allocates funds to CBOs in a fair and impartial manner); or
- Refer the matter to a Board Policy Committee having jurisdiction over the type of services the CBO provides, requesting that it be brought back to the full Board if the request has merit, in the opinion of that Committee

Related Policies



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None.

Related Forms and Information

None.

History

Date	Changes Made
1/24/2014	Policy Uploaded. (John Myers)
5/25/1999	Policy Amended. View legislative file.
12/8/1998	Policy Adopted. View legislative file.