tcc group

EVALUATION OF THE COORDINATED FUNDING MODEL

REPORT TO
THE ANN ARBOR AREA COMMUNITY FOUNDATION
UNITED WAY OF WASHTENAW COUNTY
WASHTENAW COUNTY
CITY OF ANN ARBOR
WASHTENAW URBAN COUNTY

April 2013

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I. INTRODUCTION

In the Fall of 2010, five funders serving Washtenaw County (United Way of Washtenaw County, the Ann Arbor Area Community Foundation, the City of Ann Arbor, Washtenaw County, and the Washtenaw Urban County – which represents each of these three public entities staffed by the Office of Community & Economic Development) signed a Memorandum of Understanding to design and pilot a new grantmaking model called Coordinated Funding. The Coordinated Funding model built upon earlier efficiencies within the Office of Community and Economic Development (OCED) where their Integrated Funding Model streamlined grantmaking from the City of Ann Arbor, Washtenaw County, and Washtenaw Urban County in 2008.

For the funding partners, Coordinated Funding was an opportunity to lead by example and maximize their impact in Washtenaw County. The goals for the model are to have:

- Significant measurable progress on shared goals and metrics
- More efficient deployment of grant dollars
- Stronger local nonprofit sector
- More efficient local nonprofit sector
- Preservation of public funds
- More collaborative environment (agencies and funders)

A planning phase concluded in 2010, resulting in a model consisting of:

- Identification of six priority areas for funding (Aging, Early Childhood, Housing & Homelessness, Hunger Relief, Safety Net Health & Nutrition, and School-Aged Youth)
- Program Operations funding tied to shared programmatic outcomes across the six priority areas ($4.4 million per year)
- Identification and funding of a Planning & Coordinating agency for each priority area to serve a leadership role in ensuring effective coordination and collaboration among nonprofits ($310,000 per year)
- Capacity Building Funding which focuses on improving the long-term strength and viability of a nonprofit organization ($225,000 per year)

In late 2010 and early 2011 respectively, the Coordinated Funders issued an RFQ and RFP for Program Operations funding to Washtenaw County health and services agencies. The RFP process for Capacity Building funding began in August 2011. Planning & Coordinating funding was awarded in July 2011, with the intention of renewing funding annually. Program Operations funding was awarded in July 2011 as a two year grant, and funding was extended an additional year in March 2013. A second round of Capacity Building funding was awarded in late 2012. To date, Coordinated Funders have partnered in investing 10.9 million dollars to address local health and human service issues.[1]

In May 2012, the Coordinated Funders received funding from the RNR Foundation, a local private family foundation to engage an external evaluator to conduct an evaluation of the Coordinated Funding model. The purpose of the evaluation was to identify expected and unexpected outcomes, any evidence of community-level impact, and assess the overall effectiveness of the model itself.

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[1] This does not include additional funding allocated in March 2013 for a third-year continuation of the pilot.

This report outlines findings from the evaluation and posits some recommendations for the Coordinated Funders to enhance their model.

II. METHODOLOGY

A. Design

Designing the evaluation was a collaborative effort between TCC Group and the Coordinated Funders (the evaluation team). Throughout the design process, TCC Group prepared the first draft of all deliverables, such as the logic model and data collection tools, and then revised them to reflect input from the funders.

With guidance from TCC, the Funders led the sample selection process for the qualitative data collection, using its knowledge of relevant stakeholders in Washtenaw County. The survey was sent to the broad universe of health and human services organizations in the county, regardless of their relationship with Coordinated Funding. These evaluation activities are further described below.

1. Document Review and Development of an Evaluation Framework

To frame the evaluation, TCC first reviewed key documents from the history and process of Coordinated Funding. TCC then developed an evaluation framework to articulate key evaluation questions, evidence of success and potential sources of evidence. The document review and evaluation framework process helped uncover some important assumptions about the program and created a solid framework from which to conduct the evaluation.
Table 1, below, lists the key evaluation questions.

Table 1. Evaluation Question

I. Outcomes	1. To what extent has there been measurable progress on shared goals and metrics? 2. To what extent are grant dollars being deployed more efficiently for grantees and funders? 3. To what extent has the nonprofit sector been strengthened? 4. To what extent is the nonprofit sector more efficient? 5. Have public funding levels been maintained (or increased)? 6. Is there evidence of a more collaborative environment between agencies and funders? 7. To what extent have planning and coordination agencies increased their capacity and effectiveness? 8. To what extent have funder volunteers increased their capacity? 9. To what extent have funding partners increased their effectiveness? 10. To what extent is this model replicable in other communities?
II. Strategies	1. What was the quality of the priority area/shared outcome selection process? 2. What was the quantity and quality of Capacity Building funding? 3. What was the quantity and quality of the Program Operations funding? 4. What is the quality of the overall Coordinated Funding Model?

	5. What was the quantity and quality of funder involvement? 6. How effective was the partnership between partners?
III. Inputs	1. Did the funders demonstrate sufficient capacity to engage in the partnership? 2. Was there sufficient volunteer engagement in the Coordinated Funding process?
IV. Analysis Questions	1. How can the model be improved? 2. What components of the model were most crucial for success? 3. How has funder engagement changed as the model has evolved? 4. Was there sufficient funding dedicated to program and Capacity Building support, understanding that the model does not account for cuts/increases in other funding sources?

B. Data Collection

With the clarity of the evaluation questions, the evaluation team developed a series of data collection tools to supplement the secondary data provided by the Coordinated Funders (e.g., strategy documents, RFPs, RFQ etc.). The tools used for the evaluation consisted of mixed methods, with an equal emphasis on qualitative and quantitative methods. Data collection consisted of:

- **Interviews with Funders and Volunteers:** To learn more about the dynamics of Coordinated Funding implementation and the strengths and challenges of the model, TCC interviewed seven staff from funder organizations, seven funder volunteers/trustees, and one consultant that served multiple roles in the model. These interviews were conducted over the telephone. Interviewees with more extensive involvement with the model participated in hour-long interviews while those that were more peripherally involved participated in a thirty-minute interview.

- **Planning & Coordinating Agency Interviews**: To learn more about the experiences and capacity of the Planning & Coordinating entities, TCC interviewed staff leads from all six entities. These interviews shed light on the successes and challenges of the model implementation from the Planning & Coordinating agency perspective as well as their sense of sector level outcomes. These interviews were conducted over the telephone. Planning & Coordinating entities also participated in an informal lunch discussion with TCC Group staff.

- **Health and Human Services Agency Focus Groups:** TCC Group conducted six separate focus groups with Coordinated Funding grantees and two focus groups with non-grantee Washtenaw County health and human services organizations. For grantees, there was one focus group per priority area. For non-grantees, participants were a mix of people who did not apply for funding; those who applied and did not advance beyond the RFQ process; and those who applied and made it to the RFP process but were not ultimately funded. For grantees, the focus groups explored strengths and challenges of the model and the implementation and any outcomes in

terms of grantee, funder, and Planning & Coordinating agency capacity. Non-grantee focus groups examined the utility and perceived fairness of the process and the model implementation. All focus groups were conducted in person during a TCC site visit to Washtenaw County.

- **Survey of Health and Human Services Organizations:** TCC developed and administered a survey of all Washtenaw County health and human services organizations for whom the funders had contact information. The survey assessed knowledge and experiences with the model, perceptions of burden as a result of the model (increased and decreased), outcomes related to the model and potential of the model. The survey was administered online using Survey Monkey. Overall, 78 of 134 potential respondents completed the survey (58% response rate). Of the 78 respondents, 32 were grantees, 19 never applied for funding, and 13 applied but were not funded.

- **Document Review:** TCC reviewed pertinent documents as shared by the Coordinated Funders and described above.

C. Analysis and Interpretation

TCC conducted analysis of the qualitative and quantitative data. Qualitative data were analyzed using thematic analysis, with individual interviews being coded against the logic model template. Quantitative data were analyzed using SPSS statistical software. The surveys were analyzed using basic frequencies on each survey item (e.g., percent responding to each survey item, mean responses on scaled variables). In addition, t-tests and ANOVAS were run to explore differences by survey respondent.

III. FINDINGS

The findings section follows the key strategy and outcome evaluation questions as outlined in Table 1 and is divided by question. In some cases, related evaluation questions have been discussed together.

A. Outcomes

1. To what extent has there been measurable progress on shared goals and metrics?

At the time of data collection, Year One data had not yet been released to grantees. In focus group discussions, grantees largely felt that they had been able to meet their targets. There was some speculation among grantee focus group participants that the targets were not particularly ambitious or different from previous grants in Year One. As this was largely a process evaluation, it was not expected that there would be much progress in this area.

2. To what extent are grant dollars being deployed more efficiently for grantees and funders?

Funding deployment did not end up being more efficient for many grantees, depending largely on what their funding mix was prior to Coordinated Funding and who ended up being their primary funder following Coordinated Funding. Agencies that were primarily used to United Way

funding encountered challenges in switching to OCED funding, in particular. Most grantees understood that this would likely be a growing pain and would be less of an issue moving forward. However it was unclear if the funding mix was likely to change in different funding cycles, so this could be an ongoing challenge.

Funders did not report increased or decreased efficiency in deployment of grant dollars.

3. **To what extent has the nonprofit sector been strengthened?**
4. **To what extent is the nonprofit sector more efficient?**

The design of this evaluation allowed TCC to look at the sector as a whole, as well as by grantees versus non-grantees. At this stage in Coordinated Funding's history, it is not realistic to expect increased capacity among grantees to trickle down to other nonprofits locally, nor is it realistic to expect evidence of the impact of Planning & Coordinating agencies on their priority areas among non-grantees. That being said, there is distinct evidence of areas where evidence indicates a strengthened and more efficient sector.

Organizations participating in coordinated funding indicated positive changes in several areas. These include:

- **Increased ability to strategically measure outcomes:** Survey and focus group data indicate that grantees have a greater ability to strategically measure outcomes. This finding was more pronounced in some priority areas, such as housing and aging, where there was some pre-existing work around shared metrics. Some grantees also appreciated knowing that their community peers were also working towards shared outcomes. Fifty-seven percent of grantees stated they were better able to strategically measure outcomes.

- **Increased ability to deliberately measure outcomes:** While some organizations suggested some tweaks to outcome measurement (having target percentages rather than target numbers), grantees largely felt better able to measure outcomes. There was general agreement that outcome measurement was more deliberate, both among focus group and survey respondents. Fifty-seven percent of grantees felt they were better able to deliberately measure outcomes.

- **Increased collaboration with other organizations:** While some grantees were a little suspicious about the motivations behind the push for collaboration (a common concern in funder initiatives that encourage nonprofit collaboration), there was strong agreement that nonprofits were working more collaboratively in their priority areas. While in the past organizations had been working in partnership with each other, the new model resulted in more actual collaboration. Survey results indicate a potential impact among non-grantees who may have looked for more collaborative activities to compensate for not being funded or to be a more attractive funding opportunity for the future. Several Capacity Building projects in Year Two are collaboration-focused, which will likely increase collaboration further.

Figure One below highlights sector outcomes, with the green line representing all respondents, the red line representing organizations that applied and were not funded, and the blue line representing funded organizations. Items marked by an asterisk indicate items for which the grantee response was significantly different from the non-funded response.

Figure One: How much would you agree with the following statements about the HHS sector in Washtenaw County in the last 18 months? (percent indicating agree and strongly agree)
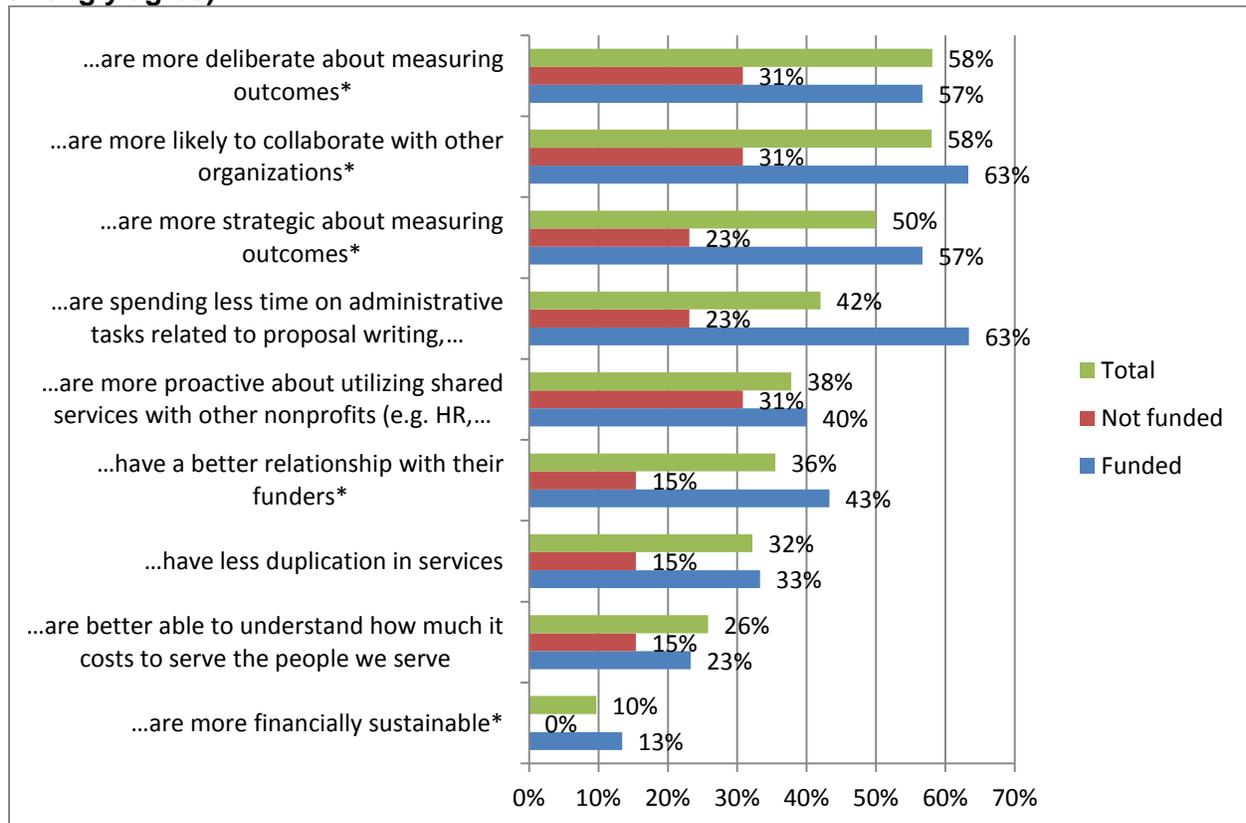
*Statistically significant difference between funded and not funded.

Figure Two below illustrates some of the specific areas where nonprofits in the county have collaborated in the past year. The non-grantee focus group participants did not shed insight into any gains in collaboration among non-grantees. Grantee focus group data indicate that the Planning & Coordinating Agency function has served as a convener for collaboration, especially for sharing information and issue-area advocacy.

Figure Two: Collaboration in the HHS sector
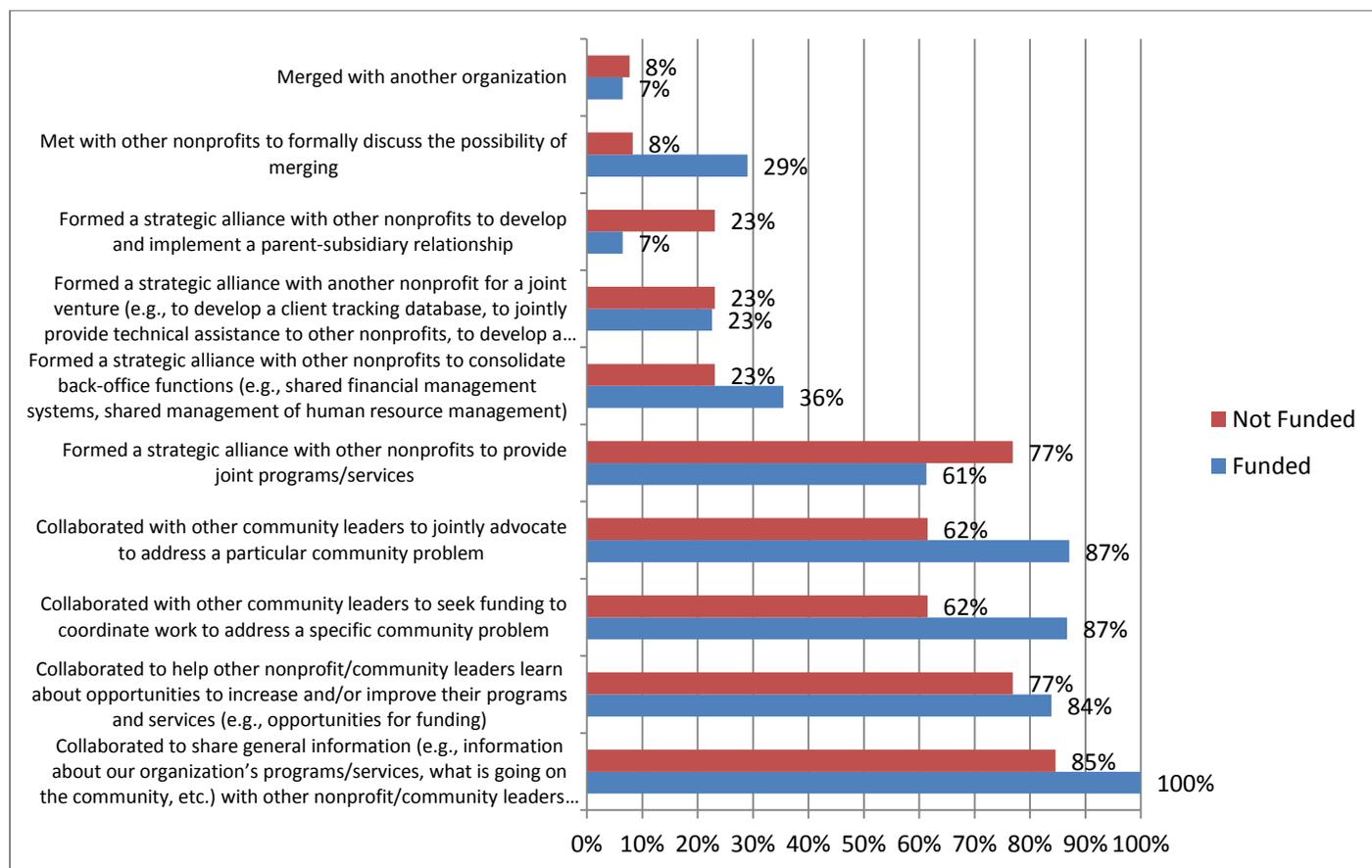
5. <u>Have public funding levels been maintained (or increased)?</u>

Not only were public funding levels maintained, the Coordinated Funders were instrumental in preventing a $260,000 cut to the County's human services budget, and $160,000 in the City of Ann Arbor's human service funding. Several interviewees from the public sector indicated that maintaining government funding for human services was much more politically feasible with the knowledge that Coordinated Funding could reduce administrative costs. Furthermore, there is a belief that by entering into a partnership with others has made it more feasible for all partners to maintain the commitment by being a good community partner. While there has been some fluctuation in funding among grantees, the overall levels have remained constant.

6. <u>Is there evidence of a more collaborative environment between agencies and funders?</u>

As depicted in Figure One above, 43 percent of funded grantees agreed or strongly agreed that they had a better relationship with funders, compared with just 15 percent of non-funded organizations. This is in line with expectations, since non-funded organizations were more likely to have reduced funder interactions. However, qualitative data showed more nuance.

Among grantees, some reported having less contact with their funders while others reported new relationships with funders. In some ways, the role of the Planning & Coordinating agencies' entities reduced funder interaction because the Planning & Coordinating agencies were playing a leadership role for the priority area. Many grantees reported going to their Planning & Coordinating Agency with questions they would have normally taken to a funder. Grantees generally felt satisfied with this shift, though there were some concerns that funders and Planning & Coordinating agencies might not always give the same answer or guidance.
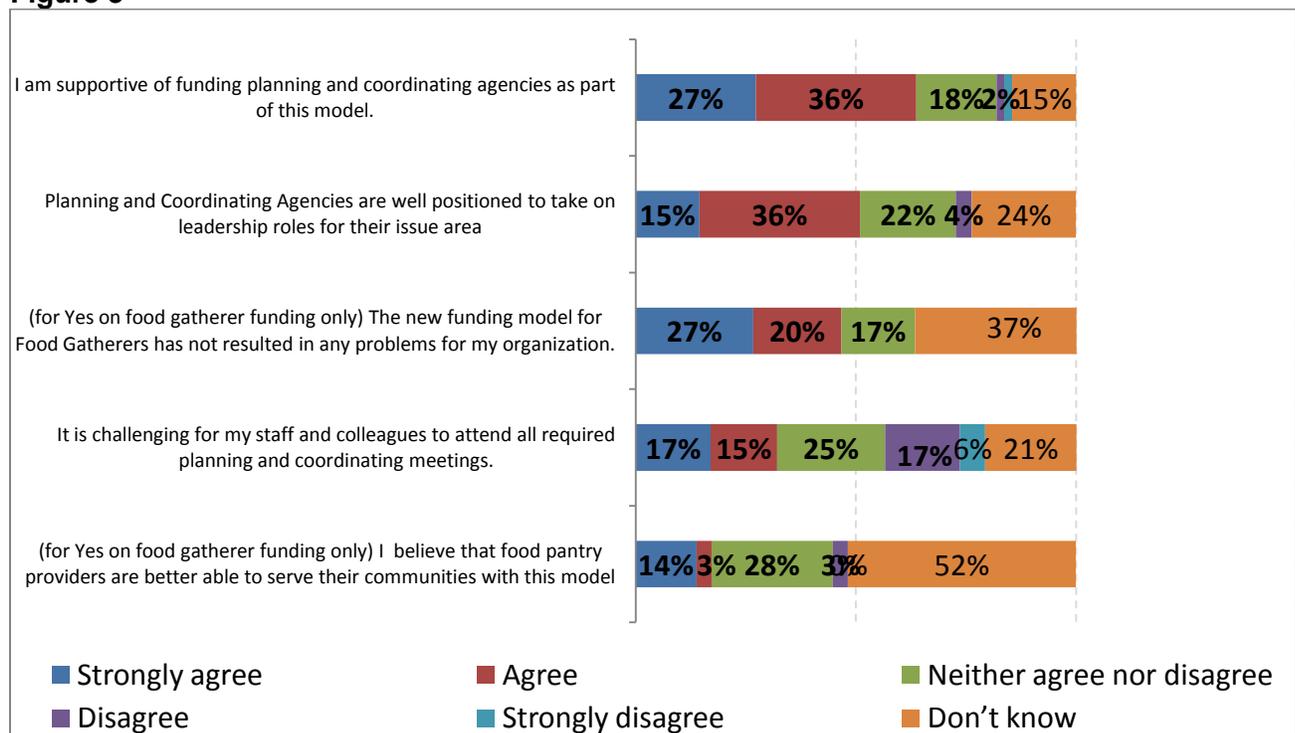
Non-grantees also reported mixed relationships with the Coordinated Funders. A few non-granted organizations felt the door had been closed to them entirely while others felt they could maintain their existing relationships with funders.

7. To what extent have Planning & Coordinating agencies increased their capacity?

Planning & Coordinating agencies evidenced a wide range of capacity at the onset of Coordinated Funding with some organizations having a much longer organizational history serving in a similar role in the community. There was agreement among interviewees and focus group participants that the Agencies had increased their capacity to serve as a leader and resource in the area but that several organizations needed more assistance to grow into their leadership role. The Planning & Coordinating agencies themselves felt that they had a greater awareness of the sector and that they were much less siloed in their work due to the peer learning component. The majority of survey respondents was supportive of the Planning & Coordinating agency role and felt the entities were well positioned to lead in their areas.

Figure 3 below illustrates the survey responses regarding the Planning & Coordinating Agency component

Figure 3

I am supportive of funding planning and coordinating agencies as part of this model. — 27% Strongly agree, 36% Agree, 18% Neither agree nor disagree, 2% Disagree, 15% Don't know

Planning and Coordinating Agencies are well positioned to take on leadership roles for their issue area — 15% Strongly agree, 36% Agree, 22% Neither agree nor disagree, 4% Disagree, 24% Don't know

(for Yes on food gatherer funding only) The new funding model for Food Gatherers has not resulted in any problems for my organization. — 27% Strongly agree, 20% Agree, 17% Neither agree nor disagree, 37% Don't know

It is challenging for my staff and colleagues to attend all required planning and coordinating meetings. — 17% Strongly agree, 15% Agree, 25% Neither agree nor disagree, 17% Disagree, 6% Strongly disagree, 21% Don't know

(for Yes on food gatherer funding only) I believe that food pantry providers are better able to serve their communities with this model — 14% Strongly agree, 3% Agree, 28% Neither agree nor disagree, 3% Disagree, 1% Strongly disagree, 52% Don't know

Legend: ■ Strongly agree ■ Agree ■ Neither agree nor disagree ■ Disagree ■ Strongly disagree ■ Don't know

8. To what extent have funder volunteers increased their capacity?

Funder volunteers (a group that includes trustees, government officials, and traditional volunteers) reported a steep learning curve at the beginning of the Coordinated Funding process. Those who served as grant reviewers were tasked with reviewing much more complex proposals than in the past. Funder volunteers reported having a much better understanding of the sector and the needs of the community as a result of the switch to Coordinated Funding. Some areas of increased capacity are:

- Increased ability to make decisions on behalf of the community rather than their organizations
- Increased ability to objectively evaluate proposals
- Increased knowledge of the sector

One volunteer noted feeling more valued by the funder organizations, while another expressed a need for greater assistance in reviewing complex proposals. Overall, volunteers were pleased with their participation and felt they were being used effectively and making a positive contribution.

9. To what extent have funding partners increased their effectiveness?

Respondents across all categories were in strong agreement that funders were operating more effectively. Although it was quite clear that the model has not yet resulted in efficiencies for funding partners, there are clear signs of increased effectiveness. Areas of increased funder effectiveness cited by funders, volunteers, grantees and Planning & Coordinating agencies include:

- **Increased access to funders for Planning & Coordinating Agencies**: Agencies generally felt very well supported by the funders and felt they received sufficient support to take on their new roles.

- **Increased collaboration:** Funders reported opportunities to jointly address community concerns in ways that would not have happened before as a result of their partnership in the model.

- **Increased context for decision-making:** Funders and funder volunteers felt the funders had more knowledge of the community context from being able to respond jointly to problems and that they were better informed in general.

- **Increased transparency:** Grantees, Planning & Coordinating agencies and funder volunteers all reported increased transparency of funders as a part of this model. This was reflected in multiple phases of the model, from the initial communications to the RFQ/RFP process to the funding process itself.

The Coordinated Funders themselves have reported increased effectiveness, but at a large time cost. There has not been any time savings for funders as this model has been implemented, and there has been a sense that this will continue to be a challenge as there is perceived to be a significant level of time investment needed to keep the model running smoothly, especially regarding funder roles. While the funders have brought in additional staff to the initiative, this has not yet resulted in efficiencies due to the need to build these new relationships. However, many respondents have expressed concern that the model is too dependent on the original key staff involved, so it is crucial to make these time investments to bring new staff on board.

10. To what extent is this model replicable in other communities?

Many respondents were unsure if the model was replicable in other communities. Survey respondents were largely mixed on this issue, but the majority felt it could be replicated to some extent. Necessary preconditions suggested by respondents include:
- Health and human services funding supported by government entities
- A relatively high level of community resources
- Early steps taken by OCED, including streamlining City, County and Urban County funding (Integrated Funding)
- Collaborative plans with shared outcomes existing in the community already, such as the Blueprint to End Homelessness—Ten Year Plan.
- In many of the program areas, an existing spirit of collaboration.
- A willingness of the United Way and the AAACF to partner together in a climate where many United Ways and community foundations have had ongoing tension.
- The willingness of funder staff to dedicate enormous amounts of time to the model, and the willingness of funder organizations to allow this shift in staff time.

Overall, respondents across all categories felt the Coordinated Funding model was worth replicating, and most dissent came from an area of concern that Washtenaw County has assets that many communities lack.

B. Strategies

1. What was the quality of the priority area/shared outcome selection process?

The priority areas selected by the Coordinated Funders were generally agreed to be the "right" ones. However, some specific service areas were noted as not fitting under the outcomes selected for priority areas, especially mental health, adult literacy, workforce development and transportation. Some organizations applied for funding anyway, trying to make their programs "fit" into the priority areas/outcomes, while others saw it as a futile exercise and opted to not apply. Grantees and non-grantees alike expressed some concerns about these areas that were viewed as being left out of the model, but at the time of data collection there was not strong evidence of major repercussions for the larger community.

The shared outcomes themselves were generally viewed as a work in progress by all respondent categories, including the Funders. Many expressed a perspective that the shared outcomes were outputs rather than outcomes, and that the outcomes were not sufficient to demonstrate impact. Several focus group respondents expressed a desire to contribute their own personalized outcomes that were more tied to their organization's mission. It should be noted that many grantees expressed a desire for more rigorous outcomes. A majority of survey respondents felt the outcomes selection process was transparent and that the outcomes themselves were realistic and measurable.

Several funders expressed a commitment to making the outcomes more meaningful in the next round of funding.

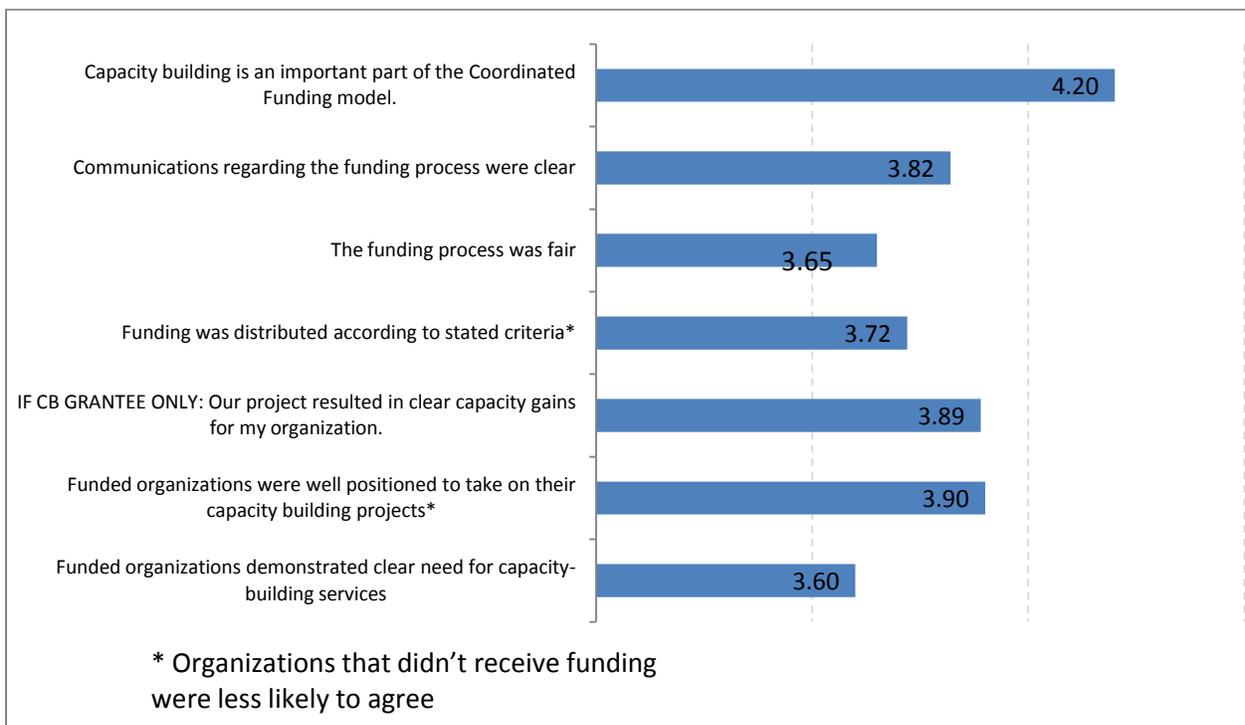## 2. What was the quality and quantity of the capacity-building funding?

While the concept of Capacity Building had overall conceptual support among respondent groups, there were some concerns about the implementation. The two major concerns about capacity-building funding across respondent groups were insufficient length of grants and insufficient funding levels.

Among grantees, the conceptual support was strong, but there was mixed support for the second round of funding which emphasized collaboration. Some organizations did not see this model fitting into their work, but still felt that they had other capacity-building needs aside from shared services. Organizations that were more supportive of the funding felt that it was really useful for organizations with shared client bases or shared needs (e.g. data systems).

Planning & Coordinating agencies expressed some concerns about the capacity-building funding, as they are both eligible for funding and are also in a position to encourage grantees in their priority area to apply. As a result there is some role confusion related to how they interact with funds set aside for capacity building.

Survey responses largely align with interview and focus group data. As expected, organizations receiving capacity-building funding were more likely to believe funding was distributed according to stated criteria and that grantees were well positioned to take on their projects.

Figure 4: Capacity Building Funding (mean response, 1=strongly disagree, 5=strongly agree)

	Mean response
Capacity building is an important part of the Coordinated Funding model.	4.20
Communications regarding the funding process were clear	3.82
The funding process was fair	3.65
Funding was distributed according to stated criteria*	3.72
IF CB GRANTEE ONLY: Our project resulted in clear capacity gains for my organization.	3.89
Funded organizations were well positioned to take on their capacity building projects*	3.90
Funded organizations demonstrated clear need for capacity-building services	3.60

* Organizations that didn't receive funding were less likely to agree

3. What was the quality and quantity of Program Operations funding?

The Program Operations funding process consisted of two phases, the request for qualifications (RFQ) phase and the request for proposal (RFP) phase. The RFQ phase ensured that applicant organizations had sufficient capacity in place to receive funding through the model. In general, there was strong support for the RFQ process. Several grantees felt the RFQ process itself was a helpful capacity-building tool as it forced them to think strategically about the type of structures that are necessary for good governance. A few organizations felt that their board minutes were not reviewed thoroughly (both grantees and non grantees expressed this concern) and that they would be not be funded as a result.
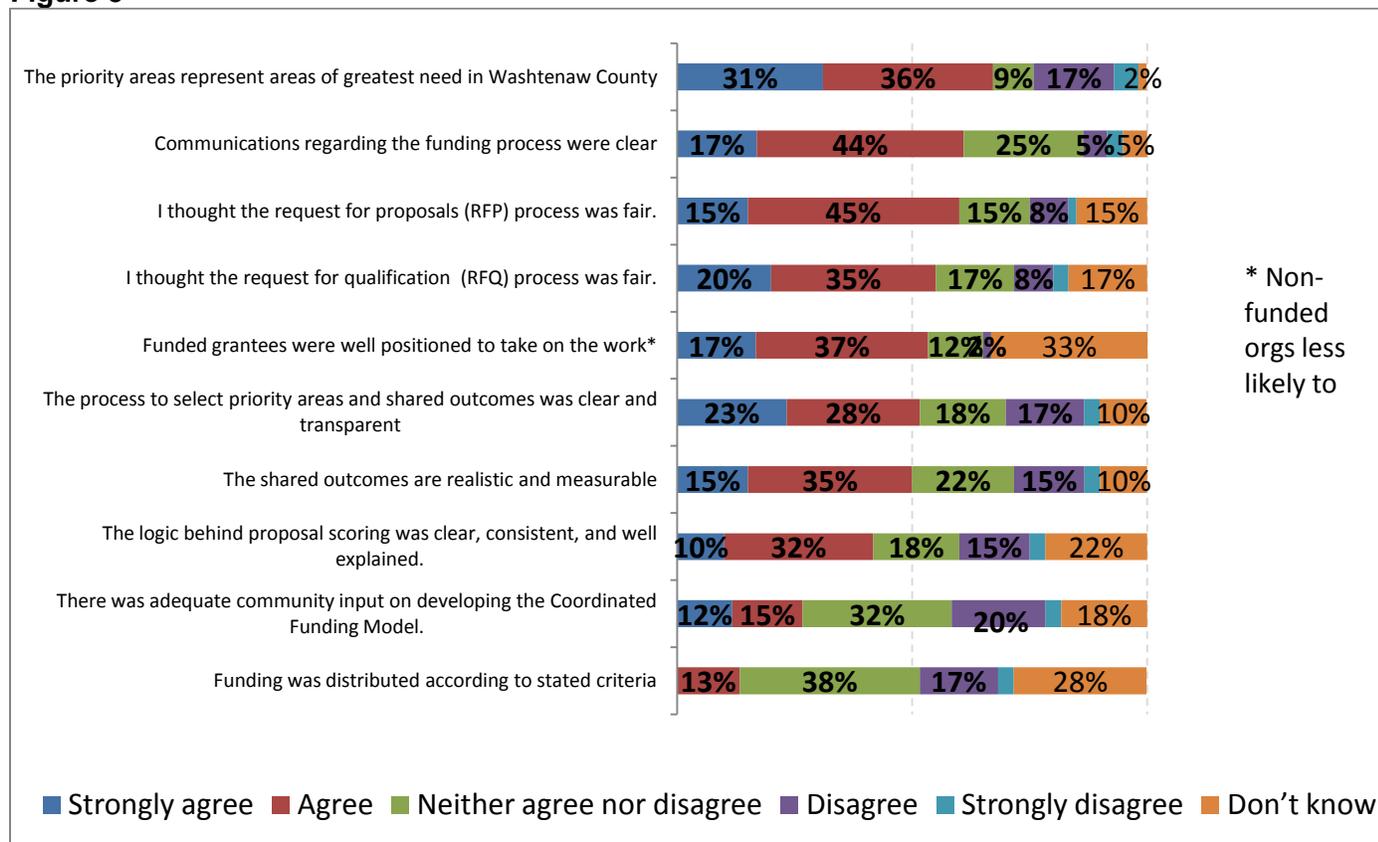
The RFP process was viewed less positively than the RFQ process, largely because grantees reported challenges in selecting outcomes. Several grantee focus group respondents felt that outcome selection was problematic, like "fitting a square peg in a round hole." Some grantees had to apply under multiple priority areas for programs that used to be funded in whole under the old model, which resulted in increased burden for smaller organizations.

Those who applied for funding offered many complaints about the online system itself, indicating a high level of frustration. The most common complaint was around what was viewed as arbitrary character limits, where applicants felt that sections that necessitated longer responses had shorter limits.

The overall funding process itself was mostly viewed as fair with some concerns expressed about criteria for individual scoring. For example, some organizations felt they were penalized for not having collaboration on a specific service, when they did not feel collaboration was important. Others were concerned that organizations were indicating that they were engaged in collaboration but that there was no investigation to ensure that was actually happening.

Figure 5 below illustrates the range of opinions of survey respondents about Program Operations funding. Survey respondents mirrored the concerns about scoring expressed by focus group respondents, indicating an area for improvement in the next round of open funding. Survey respondents expressed slightly more positivity for the RFP process compared to the RFQ process than did focus group respondents.

Figure 5

Statement	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Don't know
The priority areas represent areas of greatest need in Washtenaw County	31%	36%	9%	17%	2%	
Communications regarding the funding process were clear	17%	44%	25%	5%	5%	
I thought the request for proposals (RFP) process was fair.	15%	45%	15%	8%		15%
I thought the request for qualification (RFQ) process was fair.	20%	35%	17%	8%		17%
Funded grantees were well positioned to take on the work*	17%	37%	12%	2%		33%
The process to select priority areas and shared outcomes was clear and transparent	23%	28%	18%	17%	10%	
The shared outcomes are realistic and measurable	15%	35%	22%	15%	10%	
The logic behind proposal scoring was clear, consistent, and well explained.	10%	32%	18%	15%		22%
There was adequate community input on developing the Coordinated Funding Model.	12%	15%	32%	20%		18%
Funding was distributed according to stated criteria	13%	38%	17%			28%

* Non-funded orgs less likely to

4. What is the quality of the overall Coordinated Funding Model?

Respondents across all categories supported the overall Coordinated Funding model, with some caveats. There was general agreement that the model had extremely strong potential but that some adjustments would need to be made to fully realize that potential, especially around outcome selection. It is important to note that TCC did not hear a lot of allegations that this model was just more of the same—even highly critical interviewees/focus group respondents viewed Coordinated Funding as a deliberate effort to increase efficiency and effectiveness. However, without more meaningful outcomes and the ability to have a dashboard-like mechanism, some respondents were concerned that the impact would be negligible for the overall community in Washtenaw County.

At the time of data collection, there was some alignment around which components were working well and which were not.

Model components that were citied across respondent categories and data collection methods as working well included
- The transparency afforded by the model
- The Planning & Coordinating Agency component
- Increases in grantee capacity
- The funder relationships
- The increased knowledge of the funders

Model components that are viewed as less successful include
- The outcomes
- The technology challenges
- The limitations for programs that did not neatly align with the priority areas

For some organizations, their work was well captured by the discrete outcomes. For others, there was a need to apply under multiple priority areas, resulting in the need to participate in the activities of multiple Planning & Coordinating agencies and having some general fragmentation of what previously was funded as a whole program.

Survey respondents were asked to rate the effectiveness of the overall model, as depicted in Figure 6 below.

Figure 6

*Non-grantees less likely to agree
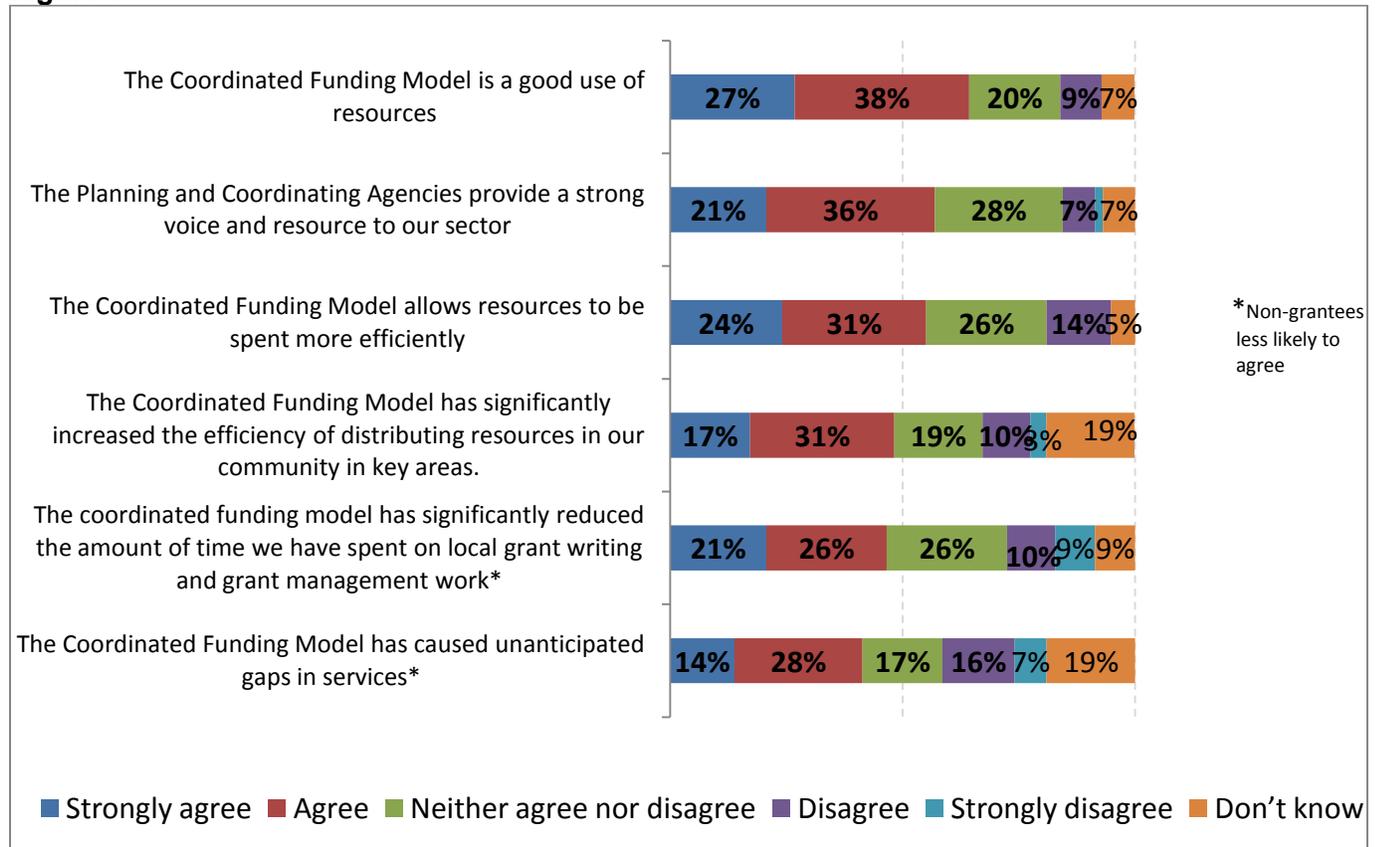
The majority of respondents (grantees and non-grantees) supported the model, viewing it as a good use of resources. While 42% of survey respondents felt the model caused unanticipated gaps in services, this data was not supported by anything quantifiable from the focus groups. It is unclear if the survey respondents were aware of specific gaps, but there were not any specific concerns articulated by focus group/interview respondents beyond areas that did not seem to be included in the shared outcomes (e.g. mental health, domestic violence, substance abuse).

5. What is the quantity and quality of funder involvement?
6. How effective was the partnership between funders?

As described in the outcomes section, the funder involvement is high quality and high quantity, and is viewed as effective. The major concern regarding funder involvement is the level of effort necessary to maintain a strong and fruitful partnership.

Funders have explored a few options to increase the sustainability of their commitment to Coordinated Funding. They have brought in additional staff from all of the funding partners to reduce individual burden of the core staff as well as to allow for a smoother transition in case any of the funding partners changes roles. This has also added a bit more upfront burden because the new staff on the model need to build their own trust and relationships within the group, but will likely reduce overall burden in the end. The funders are also exploring adding additional funding partners, which would again require some upfront time commitments but then might add greater efficiency further down the line.

Funder collaborations are often tricky to navigate, requiring high levels of trust and clear communication. While there have been some challenges, such as ensuring clarity when a funder is speaking on behalf of Coordinated Funding versus speaking on behalf of their organization, there have also been successes. The funders largely feel that they are more effective as a group and are better able to address community challenges together than they were separately. There is a good indication that the collaborative is working to play to the strengths of various partners, dividing work in strategic and thoughtful ways. There are still some issues to be addressed, such as the different levels of financial commitments of the funders and the varying capacity (e.g. time, resources) of the funders. At this point, funders described being able to address these conflicts quickly and effectively, but this could change depending on how the staff/organizational mix changes.

IV. CONCLUSION AND RECOMMENDATIONS

As described above, the overall goals for the model are to have:

- Significant measurable progress on shared goals and metrics
- More efficient deployment of grant dollars
- Stronger local nonprofit sector
- More efficient local nonprofit sector
- Preservation of public funds
- More collaborative environment (agencies and funders)

Evaluation findings indicate strong support for more efficient deployment of grant dollars, preservation of public funds and more collaborative environment (agencies and funders), and the beginning steps of progress for a stronger local nonprofit sector and a more efficient local nonprofit sector. We are unable to make a determination on the level of measurable progress on shared goals and metrics due to the timing of data collection and also the need for multiple years of data.

In order to increase the impact of the model, TCC has developed recommendations for improvement. Recommendations are organized below by topic area.

Recommendations for Program Operations Funding

- **Improve the quality (both meaning and measurability) and buy-in to program area outcomes.** While many elements of Coordinated Funding have been working well and resulted in improvements, the model will not have as strong an impact without better outcomes. Currently there is wide variation in reported outcome quality and fit across program areas, and respondents from all groups agree that the outcomes should be strengthened. It is extremely positive that many grantees desire more challenging outcomes. The funders should use the current year to re-evaluate and improve outcomes, paying special attention to community input and allowing for some creativity to allow outcomes to better fit programs.

- **Consider broadening the focus of some program areas.** For example, safety net health does not currently include mental health, and transportation could be an element of several priority areas. Overall, there are a few areas that have been excluded by Coordinated Funding. If it makes sense to include these areas, especially from the perspective of a continuum of services for clients across funding areas, the funders should identify ways to do so.

- **Improve the application and reporting process.** Many grantees expressed frustrations with the technology used for the RFP and to a lesser extent, reporting. Funders should identify ways to make these processes more user-friendly so they result in the intended efficiencies.

- **Continue to communicate and be transparent about the process.** Although the majority of applicants felt communications about the process were strong, some organizations struggled to navigate the new system. The funders should continue to be available to organizations that have questions and should continue to engage the community with a continued level of transparency.

Recommendations for Capacity-Building Funding

- **Continue capacity-building support, but clarify the intent and value of the support within the broader model.** Communication about outcomes and successes from capacity-building projects will likely allow for greater understanding of the value of the capacity-building funding, and why the criteria were in place (as opposed to general capacity-building funding).

- **Clarify roles and responsibilities of Planning & Coordinating agencies as it relates to capacity building.** Currently the Planning & Coordinating agencies have had some role confusion for the capacity-building funding as they are in direct competition with grantees for funding. However, the Agencies have their own capacity needs. A separate funding line for Planning & Coordinating Agency capacity building may alleviate this role confusion.

Recommendations for the Planning & Coordinating Agency Role

- **Increase parity of capacity amongst Planning & Coordinating agencies through targeted capacity building.** The Planning & Coordinating agencies have varying levels of capacity and community credibility in their role. The stronger Agencies should be given opportunities to continue to develop their capacity to lead in the sector and the weaker agencies should be given distinct assistance to take on their roles. Agencies have found the peer learning component to be particularly helpful, so exploring lower

cost options like having stronger Agencies mentor weaker/newer Agencies could be helpful.

- **Ensure that grantees have adequate management capacity to participate in Planning & Coordinating Agency activities.** These activities are important to the success of shared outcomes and specific coordination. As such, organizations need to have the capacity to participate in these meetings without sacrificing on the program implementation. This may particularly problematic for some organizations with grants under multiple priority areas since this requires participation in multiple Planning & Coordinating Agency activities.

- **Continue to clarify role of Planning & Coordinating Agencies.** This area is one of the less clear components of Coordinated Funding—Agencies and grantees have reported some role confusion. Greater clarity about role expectations would be helpful.

Recommendations for Funders
- **Continue to be thoughtful about bringing on new staff and new funders.** While there is some trepidation about upsetting the dynamic and level of trust of the existing funder group, the level of effort is not currently sustainable. The funders should continue bringing on additional staff and should explore including new funders. New funders should be given very clear expectations.

Recommendations for Ongoing Evaluation
- **Collect quick-turnaround feedback surveys for program components.** For example, having applicants fill out a quick feedback form on the RFP process could allow for better data for decision-making on behalf of the funders, and also an opportunity for applicants to express frustration and move on.

- **Identify ways to aggregate outcomes into dashboards to track progress.** Improvements in outcomes will allow for more meaningful data to inform strategy and understand gaps.

V. ACKNOWLEDGEMENTS

Appendix A: List of Interviewees

Name	Organization	Interview Group
Pam Cornell Allen	Washtenaw Alliance for Children and Youth	Planning/Coordinating Agency
Felicia Brabec	County Commissioner	Funder/Volunteer
Mary Jo Callan	Office of Community & Economic Development (Washtenaw County/City of Ann Arbor/Washtenaw Urban County)	Funder Staff
Todd Clark	United Way of Washtenaw County	Funder/Volunteer
Dave Clifford	United Way of Washtenaw County	Funder/Volunteer
Steve Day	United Way of Washtenaw County	Funder/Volunteer
Cheryl Elliott	Ann Arbor Area Community Foundation	Funder Staff
Neel Hajra	Ann Arbor Area Community Foundation	Funder Staff
Elizabeth Hull	Blueprint for Aging	Planning/Coordinating Agency
Debbie Jackson	United Way of Washtenaw County	Funder Staff
Margy Long	Success by Six	Planning/Coordinating Agency
Verna McDaniel	Washtenaw County Administrator	Funder/Volunteer
Andrea Plevek	Office of Community & Economic Development (Washtenaw County/City of Ann Arbor/Washtenaw Urban County)	Funder Staff
Steve Powers	City of Ann Arbor Administrator	Funder/Volunteer
Ellen Rabinowitz	Washtenaw Health Plan	Planning/Coordinating Agency
Molly Resnik	Ann Arbor Area Community Foundation	Funder/Volunteer
Jillian Rosen	Ann Arbor Area Community Foundation	Funder Staff
Kerry Sheldon	Bridgeport Consulting, LLC	Funder/Volunteer Consultant
Pam Smith	United Way of Washtenaw County	Funder Staff
Eileen Spring	Food Gatherers	Planning/Coordinating Agency
Julie Steiner	Washtenaw Housing Alliance	Planning/Coordinating Agency

Section I: Background

Organization: _____

1. Is your organization a human service-providing nonprofit agency delivering services to Washtenaw County in one or more of the following categories: Health, Aging, School- Aged Youth, Early Childhood, Housing/Homelessness and Hunger Relief?

N= 78

	N	%
Yes	73	93.6
No	5	6.4

2. How would you best describe your organization (check the **PRIMARY** category your work falls under):

N= 66

	N	%
Other (please specify)	15	22.7
Housing and Homelessness	8	12.1
Hunger Relief	4	6.1
Early Childhood	4	6.1
School-age Youth	17	25.8
Safety Net Health	12	18.2
Seniors	6	9.1

3. Does your organization provide additional services in any of these areas? Check all that apply.

	N	%
Housing and Homelessness	19	24.4
Hunger Relief	13	16.7
Early Childhood	11	14.1
School-age Youth	20	25.6
Safety Net Health	13	16.7
Seniors	11	14.1
Other (please specify)	18	23.1

4. What is your primary role in your organization?

N=65

	N	%
Other (please specify)	6	9.2
Executive Director	48	73.8
Development	4	6.2
Executive Staff	7	10.8
Total	65	100

Other (please specify)	N
Associate Director	1
Board Member	1
Consultant	1
Outgoing Board member (term ending 12/31/12)	1
Program Director	1
Supervisor of the Program Operations	1

5. What was your organization's budget in 2012? (please use numbers)

N	66
Mean	3,428,846.32
Median	507,500.00
Minimum	1,000.00
Maximum	100,000,000.00

6. Does your organization serve as a coalition/convener rather than a direct service provider?

N= 65

	N	%
Yes	4	6.2
No	61	93.8

Section II: Assessment of the Coordinated Funding Model

7. Are you familiar with the Coordinated Funding Model?

N= 67

	N	%
Yes	61	91
No	6	9

8. Did your organization apply for programmatic funding as part of this model?

N= 62

	N	%
Yes	43	69.4
No	19	30.6

9. If yes, did your organization receive funding?

N= 45

	N	%
Yes	32	71.1
No	13	28.9

If yes, did your organization receive funding?

	N	%
Housing and Homelessness	11	13.9
Hunger Relief	1	1.3
Early Childhood	2	2.5
School-age Youth	11	13.9
Safety Net Health	9	11.4
Seniors	4	5.1

10. Please indicate the extent to which you agree or disagree with the following statements about the **programmatic** funding in the Coordinated Funding Model:

	Don't know	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean
The process to select priority areas and shared outcomes was clear and transparent	10%	3.3%	16.7%	18.3%	28.3%	23.3%	3.57
The priority areas represent areas of greatest need in Washtenaw County	1.7%	5.2%	17.2%	8.6%	36.2%	31%	3.72
There was adequate community input on developing the Coordinated Funding Model.	18.3%	3.3%	20%	31.7%	15%	11.7%	3.14
The shared outcomes are realistic and measurable	10%	3.3%	15%	21.7%	35%	15%	3.48
Funding was distributed according to stated criteria	28.3%	3.3%	16.7%	38.3%	13.3%		3.86
The logic behind proposal scoring was clear, consistent, and well explained.	21.7%	3.3%	15%	18.3%	31.7%	10%	3.38
Communications regarding the funding process were clear	5.1%	3.4%	5.1%	25.4%	44.1%	16.9%	3.70
I thought the request for qualification (RFQ) process was fair.	16.7%	3.3%	8.3%	16.7%	35%	20%	3.72

	Don't know	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean
I thought the request for proposals (RFP) process was fair.	15%	1.7%	8.3%	15%	45%	15%	3.75
Funded grantees were well positioned to take on the work	33.3%	0	1.7%	11.7%	36.7%	16.7%	4.03

11. Please indicate the extent to which you agree or disagree with the following statements about the **overall** Coordinated Funding Model:

	Don't know	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean
The Planning & Coordinating Agencies provide a strong voice and resource to our sector	6.9%	1.7%	6.9%	27.6%	36.2%	20.7%	3.72
The Coordinated Funding Model allows resources to be spent more efficiently	5.2%	0%	13.8%	25.9%	31%	24.1%	3.69
The Coordinated Funding Model is a good use of resources	7.1%		8.9%	19.6%	37.5%	26.8%	3.89
The Coordinated Funding Model has caused unanticipated gaps in services	19%	6.9%	15.5%	17.2%	27.6%	13.8%	3.32
The Coordinated Funding Model has significantly increased the efficiency of distributing resources in our community in key areas.	19%	3.4%	10.3%	19%	31%	17.2%	3.60
The coordinated funding model has significantly reduced the amount of time we have spent on local grant writing and grant management work	8.6%	8.6%	10.3%	25.9%	25.9%	20.7%	3.43

12. Are there any populations or service categories that you feel have been "left out" of the Coordinated Funding model? If yes, please describe

Summary	
Beyond basic needs	6
Mental Health	4
Transportation	1
Other Populations	10
Additional Considerations	3
None	3

13. Did your organization apply for **capacity-building** funding as part of this model?

N= 58

	N	%
Yes	29	50
No	29	50

If yes, did your organization receive funding?

N= 28

	N	%
Yes	10	35.7
No	18	64.3

14. Please indicate the extent to which you agree or disagree with the following statements about the **capacity-building** funding in the Coordinated Funding Model:

	Don't know	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean
Funding was distributed according to stated criteria	46.3%	1.9%	0%	16.7%	27.8%	7.4%	3.72
Funded organizations demonstrated clear need for capacity-building services	63%	0%	3.7%	9.3%	22.2%	1.9%	3.60
Communications regarding the funding process were clear	18.5%	1.9%	3.7%	16.7%	44.4%	14.8%	3.82
The funding process was fair	40.4%	1.9%	3.8%	15.4%	30.8%	7.7%	3.65
Funded organizations were well positioned to take on their Capacity Building projects	64.2%	0%	0%	9.4%	20.8%	5.7%	3.90
IF CB GRANTEE ONLY: Our project resulted in clear capacity gains for my organization.	47.1%	0%	5.9%	17.6%	5.9%	23.5%	3.89
Capacity Building is an important part of the Coordinated Funding model.	9.3%	0%	3.7%	11.1%	38.9%	37%	4.20

15. Is your organization familiar with the Planning & Coordinating Agency component of this model?

N= 58

	N	%
Yes	41	70.7
No	17	29.3

If yes, does your organization receive funding (either credits or grants) from Food Gatherers?

N= 39

	N	%
Yes	12	30.8
No	27	69.2

16. Please indicate the extent to which you agree or disagree with the following statements about the **Planning & Coordinating Agencies** in the Coordinated Funding Model:

	Don't know	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean
Planning & Coordinating Agencies are well positioned to take on leadership roles for their issue area	23.6%	0%	3.6%	21.8%	36.4%	14.5%	3.81
I am supportive of funding Planning & Coordinating agencies as part of this model.	14.5%	1.8%	1.8%	18.2%	36.4%	27.3%	4.00
(for Yes on food gatherer funding only) The new funding model for Food Gatherers has not resulted in any problems for my organization.	36.7%	0%	0%	16.7%	20%	26.7%	4.06
(for Yes on food gatherer funding only) I believe that food pantry providers are better able to serve their communities with this model	51.7%	0%	3.4%	27.6%	3.4%	13.8%	3.57
It is challenging for my staff and colleagues to attend all required Planning & Coordinating meetings.	20.8%	5.7%	17%	24.5%	15.1%	17%	3.26

17. Do you think this model should be replicated in other communities?

Summary	
YES	8
NO	3
YES AND NO	9
Unsure/ Not enough information	6

Section III: Sector Outcomes

18. How much would you agree with the following statements about the HHS sector in Washtenaw County in the last 18 months:

Organizations in the HHS sector…	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	Mean
…are more **strategic** about measuring outcomes	1.6%	3.2%	45.2%	43.5%	6.5%	3.5
…are more **deliberate** about	1.6%	1.6%	38.7%	45.2%	12.9%	3.66

measuring outcomes						
…are more likely to collaborate with other organizations	3.2%	14.5%	24.2%	41.9%	16.1%	3.53
…are more financially sustainable	3.2%	21%	66.1%	6.5%	3.2%	2.85
…have a better relationship with their funders	3.2%	1.6%	59.7%	25.8%	9.7%	3.37
…have less duplication in services	3.2%	12.9%	51.6%	27.4%	4.8%	3.18
…are spending less time on administrative tasks related to proposal writing, reporting, etc	4.8%	17.7%	35.5%	33.9%	8.1%	3.23
…are more proactive about utilizing shared services with other nonprofits (e.g. HR, fiscal)	8.1%	14.5%	38.7%	30.6%	8.1%	3.16
…are better able to understand how much it costs to serve the people we serve	8.1%	16.1%	50%	21%	4.8%	2.99

19. In the past year, has your organization?

	Yes	No
Collaborated to share general information (e.g., information about our organization's programs/services, what is going on the community, etc.) with other nonprofit/community leaders in the community	95.2%	4.8%
Collaborated to help other nonprofit/community leaders learn about opportunities to increase and/or improve their programs and services (e.g., opportunities for funding)	82.3%	17.7%
Collaborated with other community leaders to seek funding to coordinate work to address a specific community problem	77%	23%
Collaborated with other community leaders to jointly advocate to address a particular community problem	77.4%	22.6%
Formed a strategic alliance with other nonprofits to provide joint programs/services	67.7%	32.3%
Formed a strategic alliance with other nonprofits to consolidate back-office functions (e.g., shared financial management systems, shared management of human resource management)	29%	71%
Formed a strategic alliance with another nonprofit for a joint venture (e.g., to develop a client tracking database, to jointly provide technical assistance to other nonprofits, to develop a shared earned income strategy, etc.)	22.6%	77.4%
Formed a strategic alliance with other nonprofits to develop and implement a parent-subsidiary relationship	9.7%	90.3%
Met with other nonprofits to formally discuss the possibility of merging	19.7%	80.3%
Merged with another organization	6.5%	93.5%

2. Other (please specify)

	N
Addiction services	1
AIDS Service Organization	1
Children 3-18; surviving parent/caregiver.	1
Children, adults and families with disabilities advocacy for benefits and community inclusion	1
Civil rights, disability rights	1
Conflict resolution services	1
Disaster Response - including food, clothing, housing replacement; Health and Safety training, including those needing scholarships to attend training	1
Family support services	1
Food Security & Healthy Food Access (but not specifically hunger)	1
General emergency funds and furniture program	1
Health - psychosocial care	1
Residential housing and programs for people with intellectual and developmental disabilities	1
Social Service	1
Substance abuse and Mental Health Disorders-HEALTH-	1
We work across this spectrum with children, youth, adults and seniors with disabilities. We also help folks start small business, develop job related soft skills and search for employment	1

3. Other (please specify)

	N
Disability rights	3
Leadership development	2
Mental Health	2
Case management, prevention, education, peer support	1
Civil rights	1
Counseling	1
Financial and Employment	1
Health & Safety training	1
Mentoring	1
Our Information and Assistance program not only makes referrals, but acts an individual advocate when barriers arise. Regarding question 6. we serve as both a coalition/convener and a direct service provider.	1
Reentry, Parent's workshops and baby items distribution	1
Safe space, Teen employment, Community organizing	1

Safety/neighborhood watch	1
Senior nutrition Lunch, Health & senior informative workshops	1
St. Louis Center provides daily meals, transportation, life skills building, community integration programming and many other services for its residents	1
Support to Childbearing women of all ages including adolescents and their infants	1
Transportation	1
Wellness	1