



**Budget, Governance, and Intergovernmental Relations Council
Committee Meeting Summary**

**Monday, August 4, 2025
CH-14 at 2:00 pm**

COMMITTEE AGENDA TOPICS

Agenda Overview

Financial Partner Program Review

COMMITTEE INFORMATION

Committee Members Present: Dimple Ajmera, Lawana Mayfield, Tiawana Brown and James Mitchell were present; Edwin Peacock was absent.

Staff Resources: Shawn Heath, City Manager's Office
Marie Harris, Strategy and Budget
Cherie Smith, Strategy and Budget

DISCUSSION HIGHLIGHTS

Chair Dimple Ajmera called the meeting to order and asked attendees to introduce themselves.

Cherie Smith led the presentation and dialogue around the Financial Partner Program, focusing on highlights, improvements made, and proposed areas for further enhancement.

Staff provided an overview of the fiscal year (FY) 2026 application process and implementation of the city's Financial Partners Policy. FY 2026 served as the first full fiscal year the new policy framework was used, and feedback collected during the FY 2026 budget process provided the basis for the committee conversation.

Cherie Smith presented a summary of the FY 2026 process, which saw a 72 percent increase in applications compared to FY 2025 and the funding of six new agencies. All council strategic priorities—except "Well-Managed Government"—were represented in the funded agencies. Pre-application meetings and improved outreach efforts contributed to increased engagement, transparency, and application quality. Organizations were scored based on their alignment with Council priorities and the performance measures they proposed. The policy limits city funding to no more than 30% of an organization's total budget.

Looking ahead to FY 2027, applications will open on October 1, 2025. The city will continue offering information sessions and is introducing new training opportunities, including:

- **Performance Measurement Training:** Delivered by the city's Data & Analytics team, to help financial partners align their metrics with council's strategic priorities and collect meaningful outcome data.

- **Financial Reporting Training:** Developed in collaboration with the Finance Department, this training will guide agencies on producing essential documents like cash flow statements, balance sheets, and two-year comparative financials to demonstrate organizational health.

Cherie Smith also shared that the city will offer access to grant research software, which allows eligible community-based organizations to search for external funding sources (federal, state, local and foundation). Access to this tool will be maintained for city-funded partners and may continue for a time even after funding ends, to support long-term sustainability, especially as the city moves toward term limits for financial partners.

The committee then transitioned to key discussion points for input regarding the Financial Partner Program:

1. **Application Scoring Approach:** Staff sought feedback on whether to continue formal scoring or explore alternative evaluation methods to better support funding decisions. The committee confirmed that scoring should take place and asked that staff align scoring with strategic priorities and provide a mechanism to understand an organization's effectiveness.
2. **Funding Request Limits:** Clarification was requested on how to respond when applicants request more than 30 percent of their operating budget. Committee members agreed that agencies requesting more than 30 percent of their operating budget would not be considered for funding; however, they would be included as part of the full list of agencies that applied to the program.
3. **Required Meetings:** Council was asked to weigh in on whether to make information sessions mandatory for applicants. While not required currently, doing so could ensure applicants fully understand expectations and rules of engagement. Committee members agreed that the information session should be mandatory and held during a time when agencies would be able to attend, either lunch or after 5:00 p.m.
4. **Audit Requirements:** One of the most significant feedback areas related to new audit expectations introduced in FY 2026. Cherie Smith shared that several smaller organizations, receiving around \$100,000 in funding with operating budgets under \$300,000, expressed concern over audit costs (\$8,000–\$9,000). Staff noted that CPA feedback and input from the United Way suggested audits may not be financially feasible or necessary for organizations with budgets under \$1 million. Council was asked to consider raising the audit threshold or exploring alternative financial review methods to avoid overburdening smaller partners. Staff will provide more information for consideration at the next committee meeting on September 2, 2025.

Council members expressed appreciation for the expanded support tools, particularly the grant research software, and emphasized the value of building financial capacity among grassroots organizations.

Meeting adjourned at 3:20 p.m.