

Funding for Discretionary Financial Partners

BUDGET, GOVERNANCE, AND INTERGOVERNMENTAL RELATIONS COMMITTEE

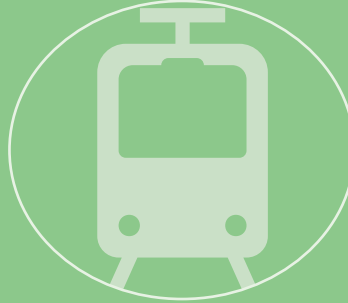
AUGUST 3, 2026

Policy Referral

- ▶ **What considerations should be primary in the selection of financial partners for funding?**

- ▶ **Committee Charge**
 - Review Council's adopted policy
 - Recommend any additional guidance/framework for funding decisions

Council Strategic Priorities Guide the Work



**Great
Neighborhoods**

**Safe
Communities**

**Transportation
and Planning**

**Workforce
Development**

**Well-Managed
Government**



Financial Partner Policy

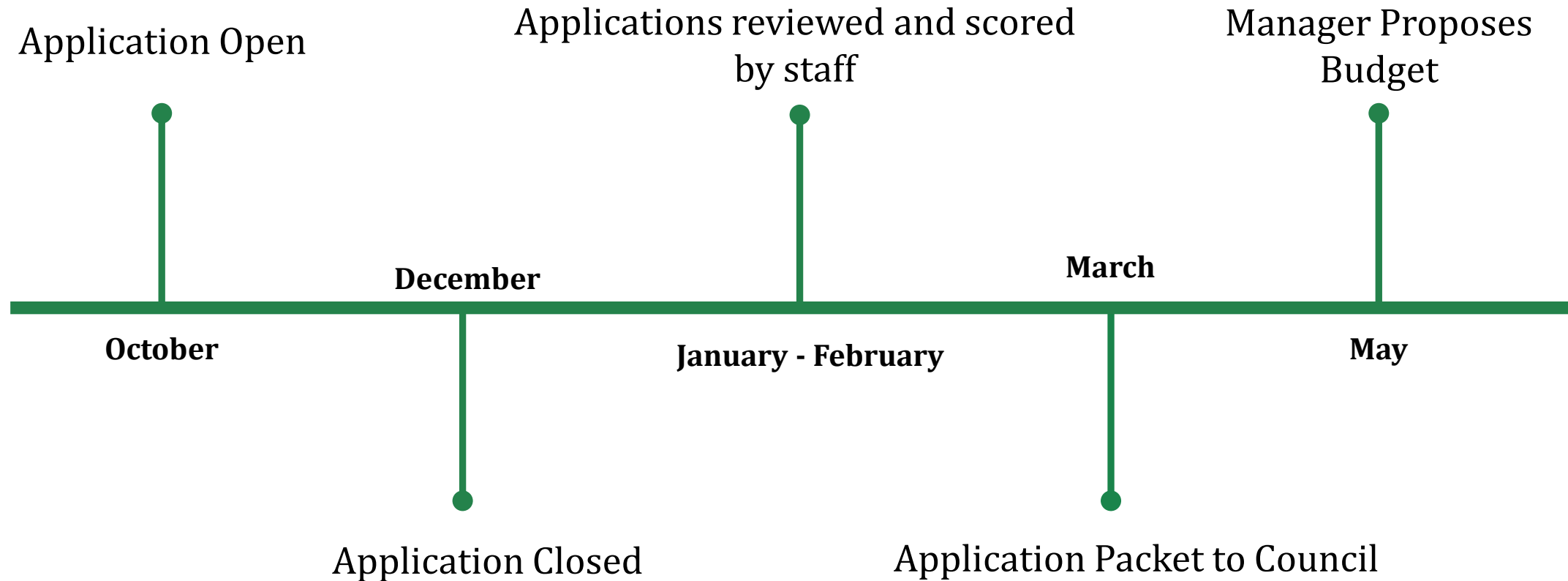
▶ **City Council adopted the Financial Partners Policy on 10/14/2024**

- A revision was approved 9/22/2025 to include updates on financial reporting

▶ **Policy accomplished**

- Formalized criteria regarding non-profit status and financial reporting requirements
- Maximum funding of 30 percent according to agency's annual operating budget
- Term limit of five years with annual approval required
 - FY2027 marks year 2 for any existing partners that receive continued funding

Financial Partner Application Timeline



Application Score

▶ **Completed by cross-functional staff teams**

▶ **Scores based on the following**

- Alignment with Strategic Priorities
- Program design & delivery
- Impact & Performance Measures
- Proposed Budget
- Organizational Capacity & Governance
- Community Need & Population Served
- Sustainability Plan

Category	Max. Points	
Strategic Priority Alignment	20	Excellent (18–20): Direct, compelling alignment with City priority; activities clearly support stated goals. Good (14–17): Clear alignment; limited depth. Fair (9–13): General or indirect alignment. Poor (0–8): Weak or unclear alignment
Program Design & Delivery	15	Excellent (13–15): Well-defined, feasible activities; strong connection to outcomes. Good (10–12): Clear design; minor gaps. Fair (6–9): High-level or underdeveloped plan. Poor (0–5): Vague or unrealistic
Impact & Performance Measures	20	Excellent (18–20): Clear objectives, measurable outcomes, realistic targets. Good (14–17): Adequate measures; mostly outcome-focused. Fair (9–13): Measures are output-focused; limited detail. Poor (0–8): Measures unclear or missing.
Financial Health & Budget	15	Excellent (13–15): Complete, reasonable budget; strong fiscal controls. Good (10–12): Generally sound; minor questions. Fair (6–9): Budget unclear Poor (0–5): Significant deficiencies or no budget provided

Category	Max. Points	
Organizational Capacity & Governance	15	Excellent (13-15): Strong leadership, staffing, board, and policies. Good (10-12): Adequate capacity; minor gaps. Fair (6-9): Limited capacity or governance concerns. Poor (0-5): Insufficient infrastructure.
Community Need & Population Served	10	Excellent (9-10): Clearly defined population; strong evidence of unmet need; focus on underserved or vulnerable residents in Charlotte. Good (6-8): Population and need are defined, but supporting data is limited. Fair (3-5): Population described broadly; limited justification of need. Poor (0-2): Population or need is unclear or not compelling.
Sustainability Plan	5	Excellent (5): Strong sustainability plan; diversified funding sources; city funds leveraged to attract other resources. Good (3-4): Some diversification planned; sustainability strategy partially developed. Fair (1-2): Minimal sustainability planning; heavy reliance on city funding. Poor (0): No sustainability strategy described.

Weighted Score

- ▶ **Adjusts application score based on existing partner status or new applicant**
- ▶ **All criteria other than application score are “pass/fail” where the agency receives 100% or 0%**

	Current Partner	New Applicant
Application Score	60%	70%
Policy Adherence	20%	20%
Completeness of Application Packet	15%	10%
Mid-year reporting Completed	5%	0%

For Consideration

- ▶ **Should staff continue to score applications?**
 - If yes, do the categories need to be updated?
- ▶ **What information would council like to see to make the most informed funding decisions?**

Discussion & Questions

