



# Coordinated Funding

Lessons from a Place-Based Grantmaking Collaborative



The Ann Arbor Area Community Foundation • United Way of Washtenaw County  
Washtenaw County • City of Ann Arbor • Washtenaw Urban County

tcc group

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## Introduction

In the Fall of 2010, five grantmakers serving Washtenaw County, Michigan, launched a “Coordinated Funding” model which they hoped would streamline grantmaking efforts, build partnerships, and increase effectiveness of the local health and human services sector. These funders, including the United Way of Washtenaw County, the Ann Arbor Area Community Foundation, the City of Ann Arbor, Washtenaw County, and Washtenaw Urban County, saw this coordinated effort as a unique opportunity to combine public and private funding in order to maximize their impact in the region.

The funders agreed to collectively invest \$5 million dollars over two years to address six vital health and human service issues.<sup>1</sup> They chose to fund Aging; Early Childhood; Housing & Homelessness; Hunger Relief; Safety Net Health & Nutrition; and School-Aged Youth.

In late 2010 and early 2011, the funders issued a Request for Qualifications (RFQ) followed by a Request for Proposals (RFP) for Program Operations grants to county health and services agencies. The grantmakers received 76 grant applications. Sixty-three programs at 40 agencies were awarded at total of \$4.4 million in July 2011.

Grantees in each of the six areas were expected to contribute to the following shared outcomes:

- Demonstrate significant, measurable progress on shared goals and metrics
- Deploy grant dollars more efficiently
- Help build a stronger and more efficient local nonprofit sector
- Preserve public funds
- Encourage a more collaborative environment for agencies and funders

Funders also identified and funded a Planning and Coordinating Agency (PCA) for each priority area to ensure effective collaboration among local nonprofits. Planning and Coordinating Grants totaling \$310,000 of were awarded in July 2011 with the intention of renewing funding annually.

Finally, the Coordinated Funding model provided capacity-building grants to improve nonprofits’ long-term strength and viability. A separate RFP process for Capacity Building funding began in August 2011, with a total of \$225,000 in grants awarded in late 2012. Remaining funds will be distributed in subsequent grants.

In May 2012, the funders received additional grant dollars from the RNR Foundation, a local private family foundation, to evaluate this collaborative model. TCC Group, a social sector consulting firm that works with funders and nonprofits across the country, was chosen to assess the overall effectiveness of the model, identify both expected and unanticipated outcomes, and examine evidence of community-level impact.



This report outlines findings from the evaluation and posits recommendations to enhance and strengthen the Coordinated Funding model.

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<sup>1</sup> This does not include additional funding allocated in March 2013 for a third-year continuation of the pilot program.

## Methodology

### Design

Designing the evaluation was a collaborative effort between TCC Group and the local funders (the evaluation team). TCC Group prepared an initial draft of all deliverables, including an initiative logic model and data collection tools, and revised them to reflect input from the funders.

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

### Document Review and Development of an Evaluation Framework

To frame the evaluation, TCC Group first reviewed documents about the history and process of Coordinated Funding. TCC Group then developed an evaluation framework to articulate important evaluation questions, evidence of success, and potential sources of information. This process helped uncover assumptions about the program and created a solid framework from which to conduct the evaluation. A list of the evaluation questions may be found in Table 1 below.

Table 1. Evaluation Question	
Outcomes	<ol style="list-style-type: none"><li>1. To what extent has there been measurable progress on shared goals and metrics?</li><li>2. To what extent are grant dollars being deployed more efficiently for grantees and funders?</li><li>3. To what extent has the nonprofit sector been strengthened?</li><li>4. To what extent is the nonprofit sector more efficient?</li><li>5. Have public funding levels been maintained (or increased)?</li><li>6. Is there evidence of a more collaborative environment between agencies and funders?</li><li>7. To what extent have Planning and Coordinating Agencies increased their capacity and effectiveness?</li><li>8. To what extent have funder volunteers increased their capacity?</li><li>9. To what extent have funding partners increased their effectiveness?</li><li>10. To what extent is this model replicable in other communities?</li></ol>
Strategies	<ol style="list-style-type: none"><li>1. What was the quality of the priority area/shared outcome selection process?</li><li>2. What was the quantity and quality of Capacity Building funding?</li><li>3. What was the quantity and quality of the Program Operations funding?</li><li>4. What is the quality of the overall Coordinated Funding Model?</li><li>5. What was the quantity and quality of funder involvement?</li><li>6. How effective was the relationship between partners?</li></ol>
Inputs	<ol style="list-style-type: none"><li>1. Did the funders demonstrate sufficient capacity to engage in the partnership?</li><li>2. Was there sufficient volunteer engagement in the Coordinated Funding process?</li></ol>
Analysis Questions	<ol style="list-style-type: none"><li>1. How can the model be improved?</li><li>2. What components of the model were most crucial for success?</li><li>3. How has funder engagement changed as the model has evolved?</li><li>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?</li></ol>

## Data Collection

The evaluation team developed a series of data collection tools to supplement the data provided by the Coordinated Funders (e.g., strategy documents, RFPs, RFQs, etc.). These tools equally emphasized qualitative and quantitative methods, and 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 members from funder organizations, seven funder volunteers/trustees, and one consultant who played 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 capacities of the PCAs, TCC interviewed staff leads from all six agencies. These interviews solicited their perspectives on the model's successes, challenges, and sector-level outcomes. In addition to formal interviews, PCAs also participated in an informal discussion with TCC Group.
- **Health and Human Services Agency Focus Groups:** TCC Group conducted six separate focus groups (one per priority area) with Coordinated Funding grantees. The focus groups explored the model's strengths and challenges as well as the implementation and outcomes in terms of grantee, funder, and PCA capacity. In addition, TCC facilitated two focus groups with non-grantee regional Washtenaw County health and human services organizations that included representatives from organizations that did not apply for funding; those who applied but 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, During these discussion groups, participants 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 which the funders had contact information. The online 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. Of the 134 organizations invited to participate, 78 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 studied pertinent documents as shared by the Coordinated Funders and described above.

## Analysis and Interpretation

TCC analyzed the resulting 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 conducted to explore differences by survey respondent.



## Findings

The following highlights responses and is organized around the strategy and outcome evaluation questions as outlined in Table 1. In some cases, related evaluation questions are discussed together.

### 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. As this was largely a process evaluation, the team did not expect much progress in this area. In focus group discussions, however, grantees generally 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.

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

While the funders did not report increased or decreased efficiency in deployment of grant dollars, ultimately, the process was not more efficient for many grantees. The Coordinated Funding model changed the “funding mix” of many of the organizations, and the overall model did not create one central distribution point for funds related to Coordinated Funding. For instance, agencies that were familiar with United Way funding protocols encountered challenges switching to Office of Community & Economic Development’s process. The various funders have different payment cycles and invoicing procedures, so if the “funding mix” changed for organizations, there often was a decrease in efficiency as organization staff would need to shift to the new funder’s protocols. Most grantees understood that this would be less of an issue moving forward. However, it was unclear whether the funding mix would change in later funding cycles, so this could be an ongoing issue.



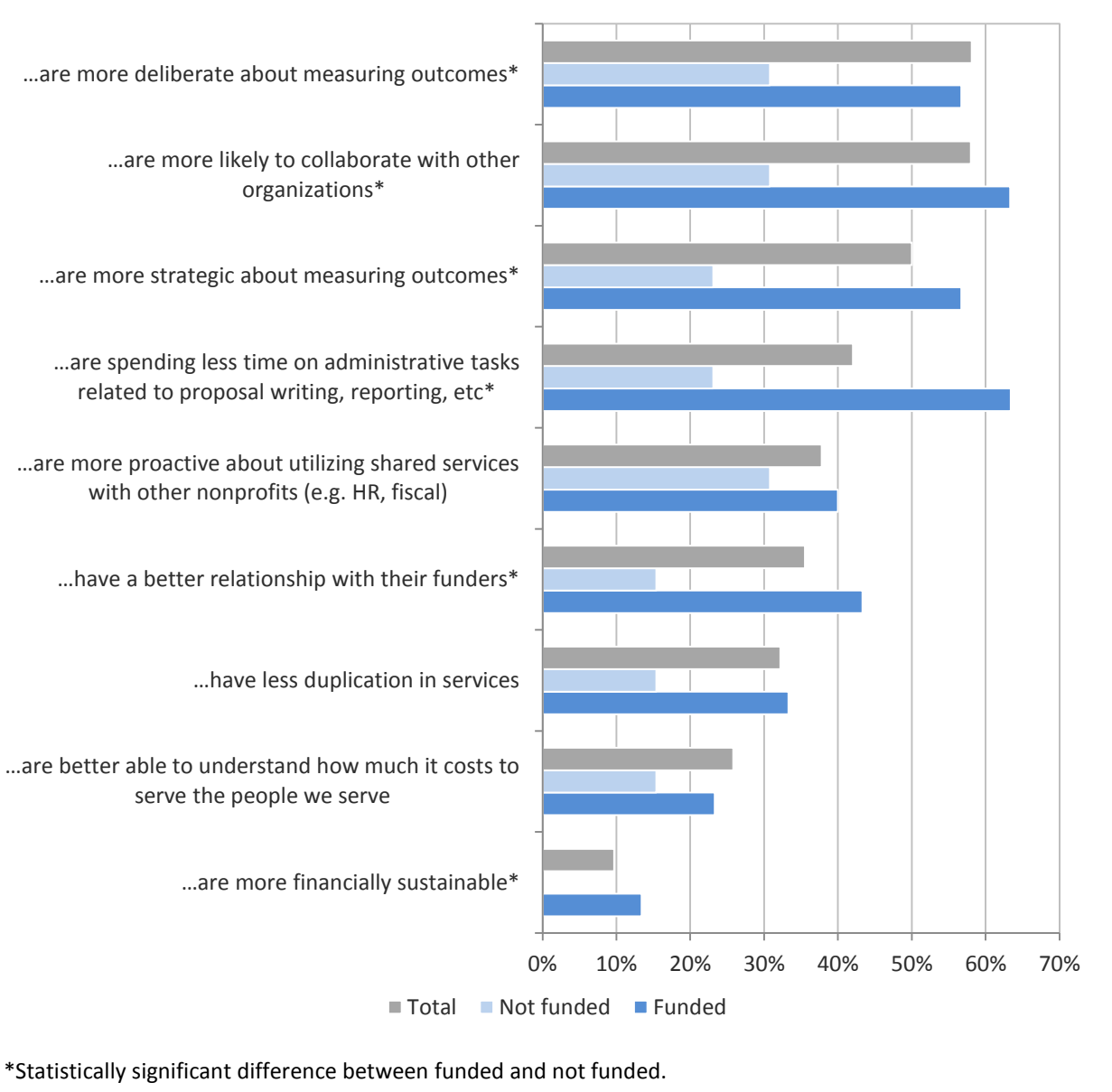
#### 3. To what extent has the nonprofit sector been strengthened?

#### 4. To what extent is the nonprofit sector more efficient?

The design of this evaluation allowed TCC to examine the sector as a whole, as well as by groups of grantees versus groups of 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 local nonprofits, nor to expect non-grantees to demonstrate impact on their priority areas. That said, there is distinct evidence of a strengthened and more efficient sector, as illustrated in the chart below.

Figure One 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 a statistically significant difference between funded and not funded grantees.

**Figure 1: 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)**



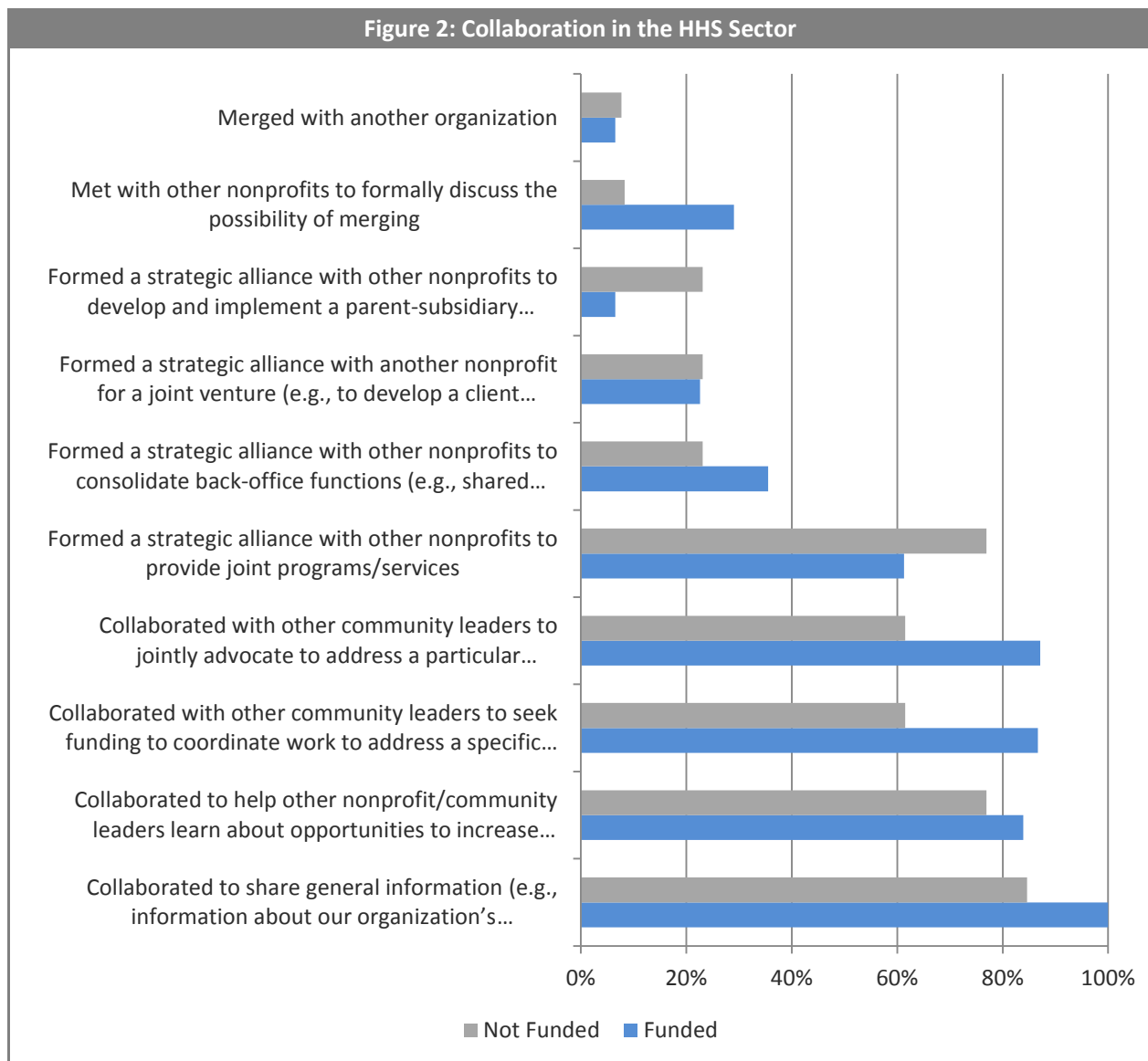
Organizations participating in Coordinated Funding indicated positive changes in several areas. These include:

- Increased ability to strategically measure outcomes:** Survey and focus group data indicated that grantees improved their ability to strategically measure outcomes. This finding was more pronounced in some priority areas such as housing and aging where there was pre-existing work around shared metrics. Several grantees also appreciated knowing that their community peers were 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 changes to outcome measurement, such as having target percentages rather than target numbers, 58% of

grantees felt better able to measure outcomes. There was agreement that outcome measurement was more deliberate, both among focus group and survey respondents.

- Increased collaboration with other organizations:** While some grantees were suspicious about the motivations behind the push for collaboration (a common concern in funder initiatives), there was strong agreement that nonprofits were partnering and working closely with other organizations. Survey results also indicated that non-grantees have increased their partnerships and collaborations perhaps to compensate for not being funded or to be seen as a more attractive funding opportunity for the future. Continued growth in this area is expected, as several capacity-building projects in Year Two are collaboration-focused.

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





#### 5. Have public funding levels been maintained (or increased)?

Public funding levels were maintained and the Coordinated Funders were instrumental in preventing a \$260,000 cut to the County's human services budget and \$160,000 in human service funding from the City of Ann Arbor. 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 entering into a collaboration has made it more feasible for all parties to maintain the funding commitment by being good community partners. While there has been some fluctuation in funding among grantees, the overall levels have remained constant.

#### 6. Is there evidence of a more collaborative environment between agencies and funders?

As depicted in Figure One (above), 43 percent of grantees agreed or strongly agreed that they had a better relationship with funders, compared with 15 percent of non-funded organizations. This is in line with expectations, as non-funded organizations were more likely to have few interactions with funders.

Qualitative data, however, showed more nuance. Among grantees, some reported less contact with their funders while others reported new relationships with funders. Given the PCAs' leadership role in each priority area, grantees often relied on PCAs for support, which reduced funder interactions. Many grantees reported asking their PCA the questions they would have normally taken to a funder. Grantees generally felt satisfied with this shift, though there were some concerns that funders and PCAs may not always give the same answer or guidance.

Non-grantees also reported mixed relationships with the Coordinated Funders. A few non-grantee organizations felt the door had been closed to them entirely, while others felt they could continue relationships with funders.



Mary Jo Callan  
Washtenaw County Office of  
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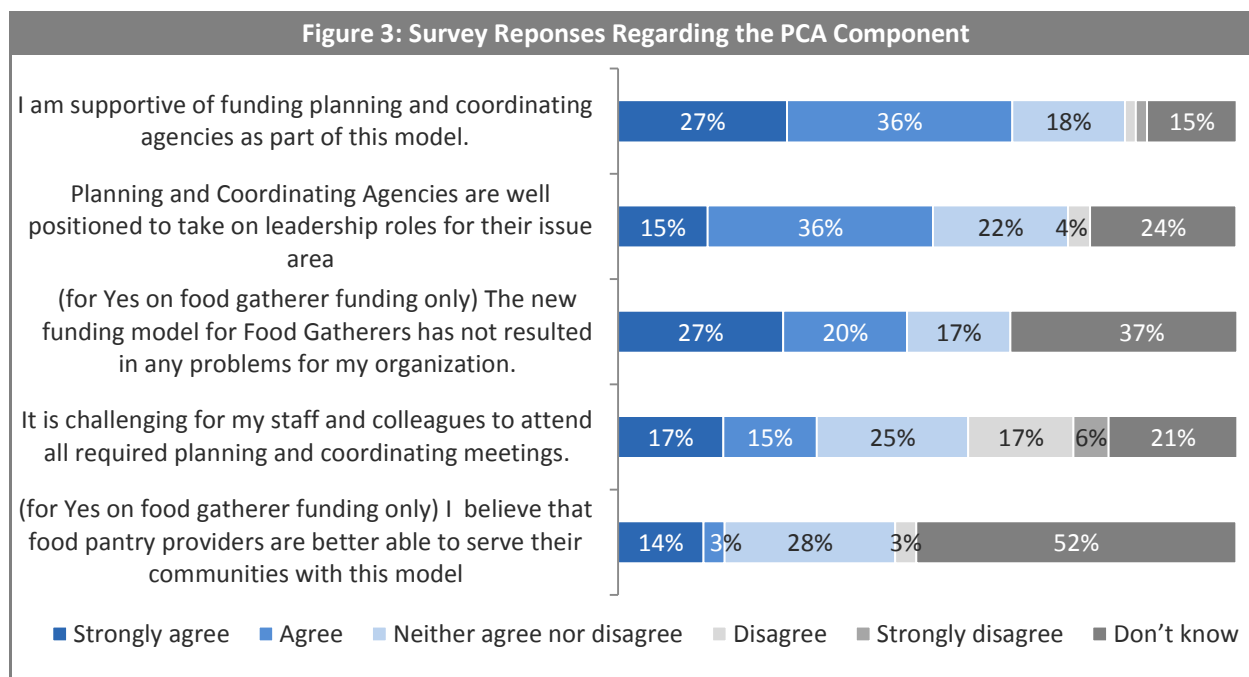
Neel Hajra  
Ann Arbor Area Community Foundation



Deb Jackson  
United Way of Washtenaw

#### 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 benefiting from a long history serving in a similar role in the community. There was agreement among interviewees and focus group participants that although some PCAs were better able to serve as a leader and resource, several needed more assistance to fulfill this leadership role. The PCAs felt that they had a greater awareness of the sector and were less siloed in their work, in a large part due to the regular meetings of PCAs. The majority of survey respondents supported the PCAs' role and felt the entities were well positioned to lead in their respective areas.



#### 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 appraising much more complex proposals than in the past. Funder volunteers, however, reported having a much better understanding of the sector and the needs of the community as a result of the switch to Coordinated Funding. In particular, funder volunteers indicated increases in:

- The ability to make decisions on behalf of the community rather than their organizations
- The ability to objectively evaluate proposals
- 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 their time was used effectively and that they made a positive contribution.

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

Respondents across all categories were in strong agreement that funders operated 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 greater funder effectiveness cited by funders, volunteers, grantees, and Planning & Coordinating Agencies include:

- **Increased access to funders for PCAs:** Agencies generally felt very well supported by the funders and felt they received sufficient support for their new roles.
- **Greater collaboration:** Funders reported opportunities to jointly address community concerns in ways that would not have previously happened, as a result of their partnership in the model.
- **Increased context for decision-making:** Funders and funder volunteers felt that funders had more knowledge of the community from being able to respond jointly to problems, and that they were generally better informed.

- **Greater transparency:** Grantees, PCAs, and funder volunteers all reported that the funders were more transparent as a part of this model. This was reflected in multiple phases, 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 great time cost. There is a sense that this will continue to be a challenge as there is a significant time investment to keep the model running smoothly. While the funders have added staff to the initiative, this has not yet resulted in efficiencies, due to the need to build these new relationships. Many respondents have expressed concern that the model is too dependent on the original staff involved, so it is crucial to introduce new staff.

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

Many respondents were unsure if the model was replicable in other communities. While survey respondents were largely mixed on this issue, the majority felt it could be replicated to some extent, but that in the region there were existing strengths that proved helpful in implementing the model, including:

- An environment in which health and human services funding is supported by government entities
- A high level of community resources
- Streamlined city and county funding
- Collaborative plans with shared outcomes and an existing spirit of collaboration
- A willingness on the part of funders form partnerships in a climate where many have experienced tension
- An inclination on the part of grantmakers to dedicate time to the model and the flexibility to allow this shift in staff time.



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

## Strategies

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

Survey respondents generally agreed that the priority areas selected by the Coordinated Funders were the “right” ones. However, it was mentioned that some specific service areas – in particular mental health, adult literacy, workforce development, and transportation – were not a good fit for the priority areas selected. Some organizations applied for funding anyway, trying to match their programs with the priority areas, 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 “left out” of the model, but at the time of data collection there was not strong evidence of major repercussions for the community.

The shared outcomes were generally viewed as a work in progress by all respondents, including funders. Many expressed that the shared outcomes were, in fact, “outputs” and were insufficient to demonstrate impact. Several focus group respondents wanted to contribute personalized outcomes that were tied to their organization’s mission. It should be noted that many grantees voiced 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 committed to making the outcomes more meaningful in the next round of funding.

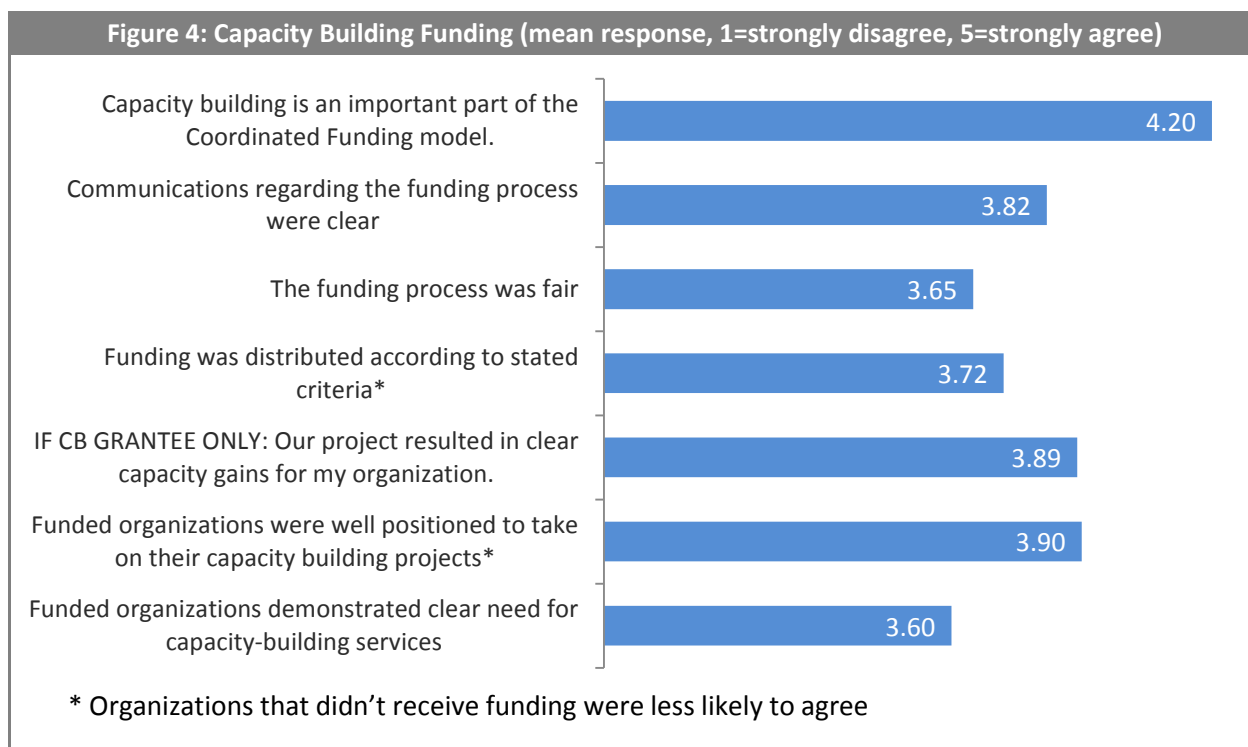
## 2. What was the quality and quantity of the capacity-building funding?

While the concept of capacity building had overall support among respondents, there were some concerns about its implementation. The two major worries were insufficient length of grants and insufficient funding levels.

Among grantees, support was strong, but there were mixed opinions regarding the second round of funding, which emphasized collaboration. Some organizations did not see how this model would fit into their work, and felt that they had other capacity-building needs. Respondents that were more supportive of the funding felt that it was useful for organizations with common clients or shared needs (e.g. data systems).

Planning and Coordinating Agencies expressed concerns about capacity-building funding, as they are both eligible for funding and also in a position to encourage other grantee organizations to apply. As a result, there is some confusion related to how the PCAs provide input to questions about capacity-building funding.

Survey responses mostly 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.



### 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 to receive funding. In general, there was strong support for the RFQ process, with several funders seeing it as a helpful capacity-building tool in and of itself, as the RFQ forced the nonprofits to think strategically about the type of structures 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 participants expressed 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 were previously wholly funded, which resulted in increased burden for smaller organizations.



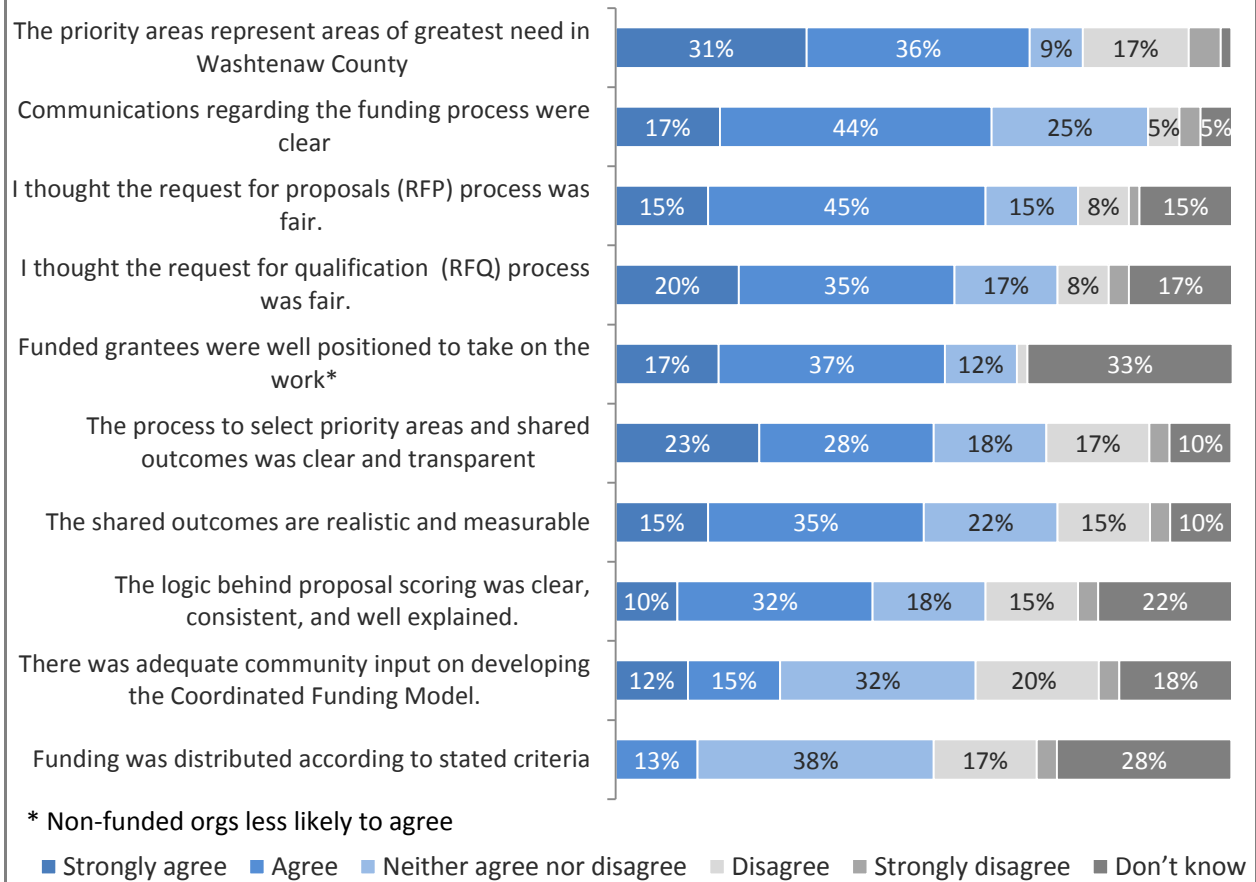
Those who applied for funding offered complaints about the online system itself, indicating a high level of frustration. The most commonly criticized element was the “arbitrary” character limit for responses. Applicants felt that sections necessitated longer responses, but space for responses was limited.

The overall funding process was generally viewed as fair, although there were with some concerns regarding the criteria for individual scoring. For example, some organizations felt they were penalized for not collaborating on a specific service, when they did not feel collaboration was important.

Other organizations were concerned that there was no investigation to ensure that collaboration was actually happening.

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

**Figure 5: Program Operations Funding**



#### 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 a consensus that adjustments should be made, especially around outcome selection. It is important to note that respondents did not voice allegations that this model was “more of the same.” In fact, even highly critical interviewees and 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 mechanism, some organizations were concerned that the impact would be negligible for the community in the region.

At the time of data collection, there was some alignment around strong and weak components of the model. Elements that were cited across respondent categories and data collection methods as working well included:

- Greater transparency afforded by the model, allowing for increased trust of the overall process and trust of the funders themselves
- Inclusion of the Planning and Coordinating Agency component, allowing for strengthened priority area leadership and collaboration
- Increases in grantee capacity, especially regarding collaboration and outcome measurement



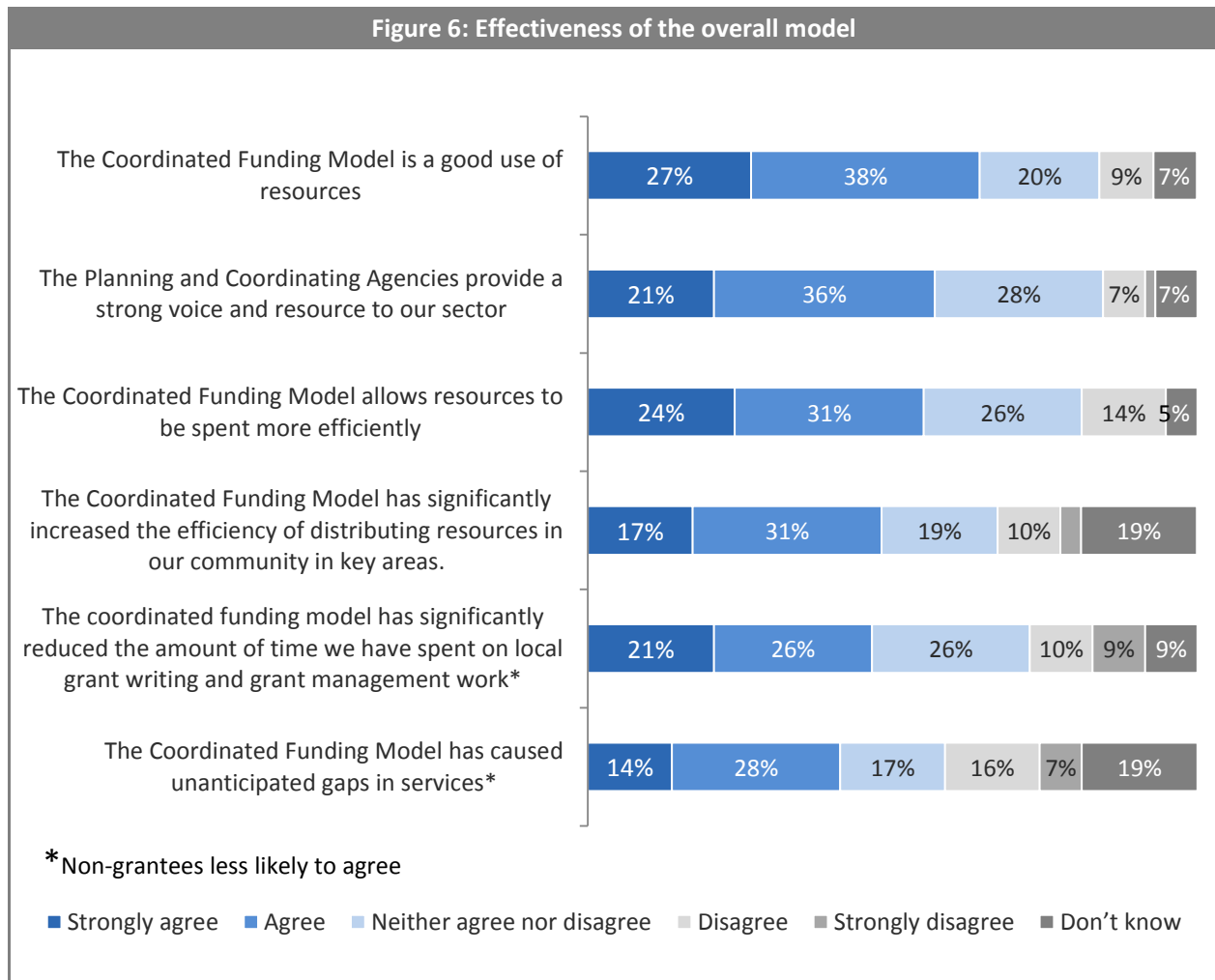
- Improved funder relationships with each other, with grantees, and with PCAs
- Increased knowledge of key issues in the health and human services sector

Model components that are viewed as less successful included:

- The shared outcomes need work to make them more meaningful to community change
- The continuing technology challenges related to the online application and reporting system
- Programs did not neatly align with the priority areas and were either “left out” of the model or forced to apply across multiple priority areas, decreasing their efficiency

Some organizations captured by the discrete outcomes well. Others, felt a need to apply under multiple priority areas, resulting in the need to participate in the activities of multiple Planning & Coordinating Agencies and experiencing some 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.



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 service, this data was not supported by the focus groups. It is unclear whether the survey respondents were aware of specific

gaps, but there were no reports of specific gaps from focus group or interview respondents. A few focus group and interview respondents articulated concerns about funding in areas that were not covered explicitly in any priority area, such as mental health, domestic violence, and substance abuse.

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

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



The Coordinated Funders explored options to increase the sustainability of their commitment to the model. For example, they added new staff members to reduce the burden on the core staff as well as to allow for a smooth transition if any of the funding partners changed roles. While this has frontloaded much of the burden, as new staff build relationships within the group, the overall burden will be reduced in the end. The funders are also exploring the addition of funding partners, which would also require an upfront time commitment, but which should add greater efficiency further down the line.

Funder collaborations are often difficult to navigate, requiring trust and clear communication. While there have been some challenges, such as ensuring clarity when a grantmaker speaks on behalf of the Coordinated Funder rather than representing the views of their individual organizations, there have also been successes. The funders largely felt that they were more effective as a group and were better able to address community challenges. There was a good indication that the collaborative played to the strengths of various partners, dividing work in strategic and thoughtful ways. While there are still issues to address, (such as the different levels of capacity and financial commitments from the funders), at this point, the funders have been able to address conflicts quickly and effectively. However, this could change depending on the staff/organizational mix.

## Conclusion and Recommendations

As referenced earlier, 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)

Due to the timing of data collection as well as the need for multiple years of data, we are unable to determine the exact level of measurable progress on shared goals and metrics

In order to increase the model's impact, TCC Group has developed the following recommendations, organized by topic area.

### Recommendations for Program Operations Funding

- **Improve the quality (both meaning and measurability) and buy-in of program area outcomes.** While many elements of Coordinated Funding worked well and resulted in improvements, the model could have stronger impact with 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 to make them more relevant to community needs, as well as to make them more rigorous. It is extremely positive note 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 more creativity to reflect actual outcomes rather than outputs.
- **Consider broadening the focus of some program areas.** For example, the safety net health focus area currently does not include mental health, and transportation could be an element of several different priority areas. Overall, there are a few areas that have been omitted by Coordinated Funding. If it makes sense to include these areas, especially from the perspective of a continuum of services for clients, the grantmakers 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 to increase 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 to transparently engage with the community.

### 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 foster a greater understanding of value of capacity building as well as the value of the criteria for funding.

- **Clarify roles and responsibilities of Planning and Coordinating Agencies as they relate to capacity building.** The PCAs expressed some confusion about their role, as PCAs are in direct competition with grantees for capacity-building funding. A separate funding line for PCA capacity building may alleviate this role confusion.

### Recommendations for the Planning & Coordinating Agency Role

- **Increase parity of capacity among Planning and Coordinating Agencies through targeted capacity building.** The Planning and Coordinating Agencies have varying levels of capacity and community credibility. 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. Agencies found peer learning valuable. Exploring lower-cost options such as asking stronger agencies to mentor weaker agencies may prove 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 the program implementation. This may be particularly problematic for some organizations with grants under multiple priority areas, as they are required to participate in multiple PCA activities.

### Recommendations for Funders

- **Continue to be thoughtful about bringing on new staff and funders.** While there was some trepidation about upsetting the dynamic and level of trust within the existing funder group, the effort need to support the initiative is not sustainable. The funders should continue to add staff and should explore including new funders in the group. Any new funders should be given clear directives.

### 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 would provide better data for decision-making on behalf of the funders and an opportunity for applicants to express frustration.
- **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.

## Appendix A: 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 and 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 Plevak	Office of Community and 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

## Appendix B: Consolidated Survey Data

### Section I: Background

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

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. 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

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

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	1
Program Director	1
Supervisor of the Program Operations	1

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

<b>N</b>	<b>66</b>
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?

<b>N=65</b>	<b>N</b>	<b>%</b>
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?

<b>N=67</b>	<b>N</b>	<b>%</b>
Yes	61	91
No	6	9

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

<b>N=62</b>	<b>N</b>	<b>%</b>
Yes	43	69.4
No	19	30.6

9. If yes, did your organization receive funding?

<b>N=45</b>	<b>N</b>	<b>%</b>
Yes	32	71.1
No	13	28.9

If yes, did your organization receive funding?

	<b>N</b>	<b>%</b>
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
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 and 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?

<b>N= 28</b>	<b>N</b>	<b>%</b>
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:

	<b>Don't know</b>	<b>Strongly disagree</b>	<b>Disagree</b>	<b>Neither agree nor disagree</b>	<b>Agree</b>	<b>Strongly agree</b>	<b>Mean</b>
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 and Coordinating Agency component of this model?

<b>N= 58</b>	<b>N</b>	<b>%</b>
Yes	41	70.7
No	17	29.3

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

<b>N= 39</b>	<b>N</b>	<b>%</b>
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 and 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 and 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 and 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? Why or why not?

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 <b>strategic</b> about measuring outcomes	1.6%	3.2%	45.2%	43.5%	6.5%	3.5
...are more <b>deliberate</b> about measuring outcomes	1.6%	1.6%	38.7%	45.2%	12.9%	3.66
...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%

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## About TCC Group

For more than 30 years, TCC Group has provided innovative solutions for the social sector. We help clients plan for the future, manage change, build capacity, evaluate progress, and scale programs. From offices in New York, Philadelphia, and San Francisco, TCC Group collaborates with foundations, nonprofit organizations, government agencies, and corporations to advance social impact.

