

## **SUN Allocation Formula Subcommittee Meeting**

June 12, 2007

Multnomah Building, Room 625

Attendees: Lisa Pellegrino (chair), John Richmond, Susan Stoltenberg, John Kelly (note taker), Fritz Hirsch, Andrea Watson, Nancy Culver, Kathy Tinkle, Lee P. Cha, Bill Scott, Nathan Teske, Nicole Croft, Owen Dailey, Angye Tilley.

### **Discussion of General Allocation Principles**

Consensus reached around the following general principles for allocating funds in the SUN service system:

1. Clients should be able to access needed services provided in the SUN system through any of the entry points i.e. “No wrong door” policy.
2. Continue to assure that organizations providing school-based services are explicitly linking children and families with community based services that are not available at the school site.
3. The system should be flexible. It should be able to expand and contract as needs and resources fluctuate among locations. Service levels should be adjusted based on periodic (possibly annual) review of the data points that govern allocation of resources, as well as annual budget projections of the various funders, and the expiration of time-limited grant funding.
4. Develop a “base plus” allocation system in which service locations or programs receive a base amount of funding to assure ongoing operation, plus an additional allocation based on factors relevant to the program area. This type of allocation systems is commonly used in other areas.
5. The system should be designed so that no single funding source covers all of the costs at any particular site to foster greater stability at any given program or site.

The group discussed whether the subcommittee has the right partners around the table create an allocation formula and process for public funds in the early childhood and anti-poverty program areas. Perhaps separate work groups need to be convened to consider these program areas, or this group may need to collaborate with existing groups who are already working in these policy arenas. The group recognized that the principles for allocation and the constellation of agencies providing these services are different than for the school-based services.

The group agreed to work on developing an allocation formula/process for school based services first, and for the community based services that serve school aged youth next. No firm decision were made on how and when to consider an allocation formula/process for anti-poverty or early childhood services.

### **SUN Community Schools**

The group reviewed current allocation methods for school based services. The county uses an indexed formula that takes into account the number of children in poverty at a school as well as the percentage of the school population in poverty. They also considered readiness of the site to

accept a school based program, and the geographic spread of school based programs across the county.

The City/Parks funded SUN sites ostensibly used the same allocation formula, however no city funded community school sites were changed at the time that the county adopted the school-aged policy framework five years ago. Since Parks used levy funds to support some of the SUN school sites, there are certain restrictions regarding geographic spread that apply to the use of these funds.

CHIF did not apply an allocation formula in deciding how to fund school-based services. Instead, it based its funding decisions on broad RFP criteria to provide after-school and mentoring programs to children in the 4<sup>th</sup> through 8<sup>th</sup> grades that promote academic achievement, reduce the number of juveniles victimized by crime and increase graduation rates, with a focus on addressing the achievement gap, serving low income families and children or those who otherwise could not afford to participate in after-school programs, and on culturally competent and culturally specific services. These focus areas were derived through a public meeting process and ratified by the CHIF Allocation Committee

The group discussed considering factors for an allocation formula including:

Attendance rates at schools as well as number of students chronically not attending.

Achievement. The group agrees that the system should not punish success e.g. by removing funding from high-achievement sites.

Committee members agreed to bring the following data to the next meeting:

1. Ranking of all school in the county by county's poverty index (# and % of students in poverty). Map of all school sites in the county with SUN sites flagged as such. Nancy Culver and Diana Hall will bring this information.
2. Dot map showing concentrations of crime in the County. The committee is specifically interested in drug and alcohol related crimes, and domestic violence. Andrea Watson will attempt to get this bring this information.
3. Map of Section 8 housing sites in the county including both project-based and tenant-based. Nathan Teske will bring this information.
4. Percent and number of English language learners by school for all schools in the county. Fritz Hirsch will bring this information.
5. Bill Scott will review the Equity Atlas for other relevant information and bring findings to the next meeting.
6. Lisa Pellegrino will sketch out key deliverables for all of the meetings currently on the calendar to discuss at the next meeting.

### **Future Meeting Dates**

Friday, June 29, 2007	9:30– 11:30
Friday, July 6, 2007	8:30– 10:30
Friday, July 27, 2007	8:30 – 10:30

Friday, August 3, 2007	8:30-10:30
Friday, August 24, 2007	8:30 – 10:30