



**Winston-Salem**

Budget and Performance  
Management Department

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**TO:** Lee Garrity, City Manager  
**FROM:** Scott Tesh, Budget and Performance Management Director  
**DATE:** 1/30/2023  
**SUBJECT:** Community Agency Allocation Committee (CAAC)  
**CC:** Tiffany Oliva, Director of Intergovernmental Affairs and Strategic Initiatives

## **Background**

Each year, the Budget and Performance Management Department (BPM) is responsible for the annual community agencies application and funding process that includes the following steps and general timeline:

- RFP made available in October
- Applications due in November
- Staff review in December
- CAAC review in January – March
- Inclusion in Manager's recommended budget in May
- Authorizations by Mayor and City Council in June
- Agreement execution in July (or after)
- Implementation and reporting throughout the year (quarterly)

The current process under which the CAAC reviews community agency funding requests (applications) was implemented in 2016 in an attempt to coordinate and streamline separate processes running concurrently in the Budget Office (for general fund and occupancy tax fund support) and Community Development (for federal funding support). The CAAC would provide an additional layer of review, beyond what was conducted by staff at the time, and make recommendations to the City Manager regarding changes in community agency funding recommendations to the City Council.

## **Current Challenges**

The CAAC has struggled to reach a quorum in a majority of its meeting in recent years, even with the transition to the virtual meeting format. This is partially due to an inability to fill vacant positions as well as higher levels of absenteeism with seated members. The CAAC is authorized to have nine members, and throughout the FY 2022-23 process (last year), the CAAC never had more than four voting members at a meeting. Throughout the FY 2021-22 process, the CAAC never had more than three voting members attend a meeting. The first meeting of the CAAC for this year was held on January 26<sup>th</sup>, and only one CAAC member was present.

At its inception, the CAAC produced several recommendations for the City Manager as well as the Mayor and City Council. Through the budget process, some of those recommendations were not implemented, which anecdotally led to several members

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**City Council:** Mayor Allen Joines; Denise D. Adams, Mayor Pro Tempore, North Ward; Barbara Hanes Burke, Northeast Ward; Robert C. Clark, West Ward; John C. Larson, South Ward; Jeff MacIntosh, Northwest Ward; Kevin Mundy, Southwest Ward; Annette Scippio, East Ward; James Taylor, Jr., Southeast Ward; City Manager: Lee D. Garrity

questioning the need for the CAAC. All members were apprised of the steps in the budget process, which include management and Council review. At this point, attendance at the meetings has waned to a level where staff feels appropriate public input is not being received in a way sufficient to produce an official report of recommendations.

### **Recommendations**

Recommendations below are twofold with respect to the current community agencies process. The first recommendation regarding process responsibility should make the process more efficient for staff. The second recommendation includes a review of opportunities to strengthen the process.

1. Transition of Community Agencies Process to Director of Intergovernmental Affairs and Strategic Initiatives (IASI)

After discussions with the management team, BPM recommends transitioning functional responsibility for the community agency funding process to IASI. The current director has filled two new positions designed to execute agreements and perform grant monitoring for agencies funded through ARPA revenue replacement. These positions are dedicated exclusively to community agency funding and will have the capacity to better meet the needs of the agencies while potentially providing a higher level of on-site monitoring. Currently, BPM has one Budget and Evaluation Analyst assigned to the function, while the analyst also maintains a modified departmental workload. This current set-up hampers the growth and development of that analyst who does not have the opportunity to take on more advanced assignments and learn more complex budget processes. BPM also has a small level of support provided for administrative needs.

2. Suspension of CAAC FY 2023-24 Annual Review and Review of Process and Recommendation for Increased Public Review and Accountability

Due to lack of attendance in the current year and inability to consistently attain a quorum of voting members in prior years, BPM recommends suspending the CAAC review for FY 2023-24 process to provide an opportunity to review strategies for increasing attendance and/or alternative processes to increase public review and feedback. For the current year, staff scoring has already taken place. Those scores will be presented to management as part of the review process.

IASI will work with BPM and the Community Development Department (who oversees subrecipient monitoring for federally-funded agencies) to review current barriers to success and propose solutions to increase attendance. Additionally, staff will review other options to increase public feedback in providing recommendations to the City Manager for inclusion in his budget proposal to the Mayor and City Council. Changes would be implemented as part of the FY 2024-25 community agency funding process.

