M2.01 MAKING DIFFICULT DECISIONS:
How to Design an Effective Project Review and Reallocation Process

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Role with CoCs Processes

- Staff the North Carolina Balance of State Continuum of Care

- Consult for other NC CoCs with project review and reallocation processes

CoC Strategic Goals and Planning

- Lay the ground work ahead of time

- Educate leadership and grantees/applicants

- Use data to help decide where you should invest

- Look at total portfolio

Essentials for a good process

- Goal-oriented
- Informed
- Fair
- Transparent
- Clear
- Evaluate and adjust
- Policies/Procedures to fall back on
- Plan ahead

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The BoS scorecard has four goals.

- Fund organizations that have the capacity to run effective programs (can manage and administer the program, can operate on reimbursement basis, have experience serving this population or a similar one)

- Fund projects that reflect the Balance of State Continuum of Care & HUD's priorities: permanent housing and serving the chronically homeless and veterans

- Incentivize agencies to be good partners (participating in community efforts to end homelessness and HMIS, helping create infrastructure for their community's homeless service system to operate effectively throughout the year)

- Ensure that funded projects are being good stewards of BoS CoC funding and performing to BoS CoC standards

The NC BoS CoC uses two committees for scoring and project review.

- Informed, transparent, fair and clear
- Scorecard Committee
  - Revises scorecards to reflect updated priorities, address identified issues
- Project Review Committee
  - Unbiased
  - Applies scorecards to projects
  - Makes decisions on ranking, projects that do not meet project review standards

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Scorecards are divided into two parts.

- Combined Scoring section
  - Scored by CoC staff + 1 member of Project Review Committee
  - Some subjective measures
  - Scores averaged
- Staff Scoring section
  - Objective measures
  - Some info by interview
  - Scored by NCCEH staff only

Project Review Committee Process

- Orientation Meeting
  - Review of current scorecards and process
- Committee Members receive assigned projects to review
- One-on-one calls with staff
  - discussing individual scores and projects.
- Final Meeting
  - Review scores
  - make decisions regarding ranking and inclusion of projects in application

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Deciding what to score

- What evidence will we use?

- What connection does this have to our CoC goals?

- What relative importance does this have?

- How much is too much?

- What should be required vs. incentivized?

- What is the difference between poor participation and poor performance?

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Scorecard structure

- Two scorecards: New and Renewal

- Points (awarded or deducted)

- Standards (met, not met, n/a)

- Scorecards are divided into sections

- Each section has a minimum that must be met

- Attempt to balance set process with flexibility

- Several questions pulled from scorecard in 2015 and put into Grantee Certification

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Section V: Project Performance

Possible Points +	Possible Points -	Minimum	Project Score
PSH: 145 RRH: 135 TH: 135	-40	PSH: 48 RRH: 30 TH: 30	

PROJECT QUALITY REQUIREMENTS		
Renewal projects must receive at least the minimum score in each section. If a minimum is not met, further review will be triggered. After further review, the Project Review Committee will determine potential consequences, including whether the project is ineligible for inclusion in the final BoS CoC application or will receive reduced funding.	**Maximum Score Possible:**	**PSH: 199** **RRH: 184** **TH: 179**
	Project Score:	

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Sections scored on NC BoS Scorecards

Renewal Projects	New Projects
	Organizational Capacity
General Application	General Application
HUD and CoC Priorities	HUD and CoC Priorities
	Scope of Services
Match and Leverage	Match and Leverage
Project Performance	Project Performance
	Agency's Relationship to Community
Deductions	Deductions

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NC BoS Scorecards and Grantee Certification

- 2015 Renewal Project Scorecard
  - http://www.ncceh.org/files/5744/

- 2015 New Project Scorecard
  - http://www.ncceh.org/files/5743/

- 2015 Grantee Certification
  - http://www.ncceh.org/files/6274/

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Reallocation Essentials

- Strategic
- Thoughtful
- Responsible
- Partnership