



## City of Salem, Oregon TOT Grant Process Review Sub-Committee Meeting

May 20, 2024  
3:00-5:00 PM  
In Person

Salem CD Building & Safety Conf Room 320  
555 Liberty St SE, 3<sup>rd</sup> Floor, Community Development Dept.,  
and via Zoom

### Zoom Link:

Join Zoom Meeting

<https://us02web.zoom.us/j/88263140295>

Meeting ID: 882 6314 0295

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Meeting ID: 882 6314 0295

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### City of Salem Planning Division YouTube Channel

Link: <https://www.youtube.com/channel/UCUsS60lpf8AGI1u24Yg248Q/>

Si necesita ayuda para comprender esta información, por favor llame 503-588-6173

Sub Committee Participants:

#### CTPAB Board Members

Ryan Gail, Carlee Wright; Roger Williams

#### Facility Operators

Alicia Bay, Gilbert House Children's Museum, Yvonne Putze, Deepwood Museum & Gardens, Kathleen Fish, Salem Multicultural Institute

#### Staff

Chris Neider, Staff Liaison; Kelly Kelly, Staff Support

### AGENDA

1. Review of TOT Grant Manual and applications for next TOT grant cycle.

2. Review of the Google Feedback Survey for TOT 2024 (attached)

**This is the 2<sup>nd</sup> meeting of the TOT Grant Process Review Sub Committee. The group will try to wrap up TOT Grant Process Review and report back to the CTPAB at the June 11, 2024 Meeting.**

This meeting is being conducted in person with remote attendance available to the public. Interested persons may view the meeting online on [YouTube](#). Please submit written comments on agenda items, or pre-register to provide Public Comment on items not on the agenda, by 5 p.m. or earlier one day prior to the day of the meeting at [cneider@cityofsalem.net](mailto:cneider@cityofsalem.net)

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**MINUTES**  
**TOT GRANT PROCESS REVIEW SUB-COMMITTEE MEETING NOTES**  
**Wednesday, May 1, 2024**  
**Live and Remote (Hybrid) Meeting,**  
**In CD Large Conf Room 305 and via ZOOM**  
<https://www.youtube.com/watch?v=PLiCD7P1gHw>

Ryan Gail – CTPAB Board  
Roger Williams – CTPAB Board  
Carlee Wright – CTPAB Board  
Alicia Bay – Gilbert House Children’s Museum  
Yvonne Putze – Deepwood Museum & Gardens  
Kathleen Fish – SMI – World Beat Gallery

**STAFF PRESENT**

Chris Neider, CS Program Manager III  
Kelly Kelly, CS Staff Assistant

**1. WELCOME AND CALL TO ORDER**

Chris Neider began the meeting at approximately 3:05 with 3 CTPAB Board Members and 3 Facility Operators present to operate as the TOT Grant Process Review Sub-Committee.

Chris Neider and Kelly Kelly, CTPAB board staff liaisons, were also present.

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**Establish Sub-Committee for Parking Lot Review Items**

A sub-committee of Ryan Gail, Carlee Wright and Roger Williams was recommended for review of the TOT Grant Application process and parking lot items. Add 3 facility operators and schedule sub-committee meeting ahead of next TOT meeting. Have sub-committee report recommended changes or improvements back to board at June meeting.

**Other Business & Parking Lot Items for Future Discussion (All) –**

- Discuss limiting organizations to 1 event, or maybe 1 large and 1 small.
- Discuss returning scoring matrix to 100.
- Discuss funding levels of \$10,000 vs something less if numbers of applications may continue to grow beyond funding each cycle.
- Discuss Facility Operator Grants being funded equally vs by high to low scores each year.
- Discuss non-acceptance of corrections or addendums beyond the application deadline.
- Discuss further refinements to the application questions, and possible further character limitations to recipients’ answers.

- **Action Item:** At the April TOT meeting, select a sub-committee of Board and Facility

Operator members for committee discussions.

- Bring proposals back to the June Board Meeting for votes.

### **Meeting Minutes:**

#### **Review of TOT Grant Manual, Applications and scoring process in general.**

Chris reviewed the current version of the TOT Grant Manual with the group.

**Changes in order listed suggested:** Start with Facility Operator, then Capital Improvements, then Events and Projects.

**Capital Grants:** Keep at up to \$20,000, with a 50% match of actual **receipts**.

**Carlee:** Clarify URL/link request wording so folks actually give us their Social Media links. We want to be able to click on them.

**Alicia:** Definitions clarified in a Definitions Section:

i.e. What do we mean by DEI (page 10 in current manual)

Concern is some Projects or Capital Improvements are not in themselves DEI supportive. Applicants should refer back to their entire facility or organization mission and how improved facilities improve their ability to forward their mission statement, etc.

**Carlee:** Thinks if applicants are reading the manual, the rubric is well explained. Hyperlinks to the applicable part of the manual were suggested. Chris noted it is already the same document (a link within a link??).  
References to the applicable part of the manual are helpful.

**Ryan:** Clarified having a CTPAB member and some Applicants at Orientation to answer questions and share experience is very helpful.  
Tips page (page 10): Carlee thinks it is overwhelming. Move links to the bottom. Reorganize. Tips/Additional Resources to top, Links to bottom.

#### **Chris: Asked group how COS/TOT grant process compares to other grant processes and programs?**

**Yvonne:** It is more approachable. Chris can be reached for questions, which is super helpful.

**Alicia:** Budget/Bank Statements requirement for Facility Operators is overwhelming. Matching is not required anywhere else. 990 instead would be simpler. How was your TOT money used? It becomes general operating money.

**Carlee:** Great way to simplify process for Facility Operators. Let's make this simpler and better for the Facility Operators.

**Ryan:** Page 16. Actual financial scoring criteria. What meets this for us and operators?

**Chris:** How can we make this simpler for the operators, yet still see what we want to see? What percentage of your money is coming from TOT?

**Yvonne:** The cash referral process for us is the complicated thing. No other grants require this process of us.

**Alicia:** Doesn't want cash accruals process requirement. 990 is most required. Checking and bank statements never required elsewhere.

**Carlee:** Doesn't want bank statements in the future.

**Yvonne:** Narrative question that covers what TOT graders want to see. What percentage to marketing? Multiple choice or boxes to check to keep narrative simple.

**Action:** Get rid of transformation process for Facilities. Figure out narrative Q&A that gives the answers wanted for scoring. This change will simplify the process by at least ½ for Facility Operators.

**Kelly:** Noted poorly or incorrectly completed Budget Sheets was a repeated concern for scoring.

**Carlee:** Feels incomplete or incorrect budget sheets should not be accepted. Should make it clear they are supposed to be balanced. Make decision to NOT ACCEPT applications with unbalanced budget sheets. At least give a ZERO for budget portion of score, which may give a total low score below 18.75.

**Ryan:** How to deal with information received verbally after deadline.

**Yvonne, Alicia and Kathleen:** All agreed this should not be allowed after application deadline. Would all like to see this change and not be allowed in the future. No testimony beyond what is in application is allowed elsewhere.

**Action:** Don't allow additional testimony beyond application process moving forward. Make this change clear at Orientations, etc.

**Yvonne:** Those that did a good job don't get any questions asked. Those that do poorly get to correct a poor application verbally at the meeting of the committee, after application deadline.

**All:** Rely on applications as turned in. No longer require applicants to come or be present for questioning. Score application based on what is turned in. Make it clear there will no longer be follow up questions to clarify scoring.

**Carlee:** Scorers can leave feedback why they scored things low, based on information given, and clarify what would be more helpful or useful for a better score in the future.

The group hopes staff (Chris and Kelly) will do a quality review as applications come in, ahead of the deadline, for quality control checks ahead of the application deadline, to try to received complete applications, ahead of deadline.

Technical Review: Chris says a basic technical review occurs, not a complete review and assessment of each application.

**Chris:** Leans towards “take as submitted” for process.

Whatever an applicant submits, that’s how it is and what gets graded.

**Alicia:** There should be a “wall” between board members grading and discussing, and applicants or members of the public. This change needs to be implemented moving forward.

**Yvonne:** Asked if “discussion” of the grant has to happen at a public meeting? Is there value to have discussion vs just read and score the application? Score outside of meetings without dialogue. If we take away the forum for asking questions, is there any point to have the board discuss at public meetings?

**Change Recommended for New Facility Operator qualifications:**

Limit how many years old events can be for someone interested in becoming a new Facility Operator. Add a 5-year old or newer limitation for previous qualifying events.

**Yvonne: Question:** feels like she cuts and pastes for Facility, Event, Event. Feels redundant.

**Chris:** noted it is ok to cut and paste and repeat as is appropriate, since applications are separate entities. It is more important for tracking each separate application.

**Question:** Should we keep the bonus points in the scoring rubric?

**Ryan:** 1<sup>st</sup> question in Facility and Event application. Repetitive? Scoring criteria too similar to scoring and question about funding goals (page 14)?

**Chris:** questions are aligned to scoring rubric points, breaks up application questions into smaller pieces, like organizational structure, programming, services, staffing, volunteerism.

**Carlee:** If an applicant reads through the manual, they will be able to line up their answers with the wanted points.

**Chris:** The questions are designed in coordination with the scoring rubric, to isolate aspects we want to know about and give points for.

**Kathleen:** Agrees both parts of questions as listed are valuable to isolate and get to the things the board wants to know and give points for.

**Yvonne:** Question about sufficient staffing – What is sufficient?! Are they not being sufficient although what they do with three staff should really have 8 staff? Maybe word smith for a word more explaining than “sufficient”? What is the acceptable outcome for that answer? What would be unacceptable? What meets the scoring criteria well?

**Carlee:** Appendix with definitions, IE, DEI, Sufficient. Look at other grant applications for key terms. Putting applicants and scorers on same page.

**Next meeting will be Monday, 5/20, 3-5 PM.**

Respectfully Submitted,

Kelly Kelly, Board Staff Support

# TOT Grant Feedback 2024

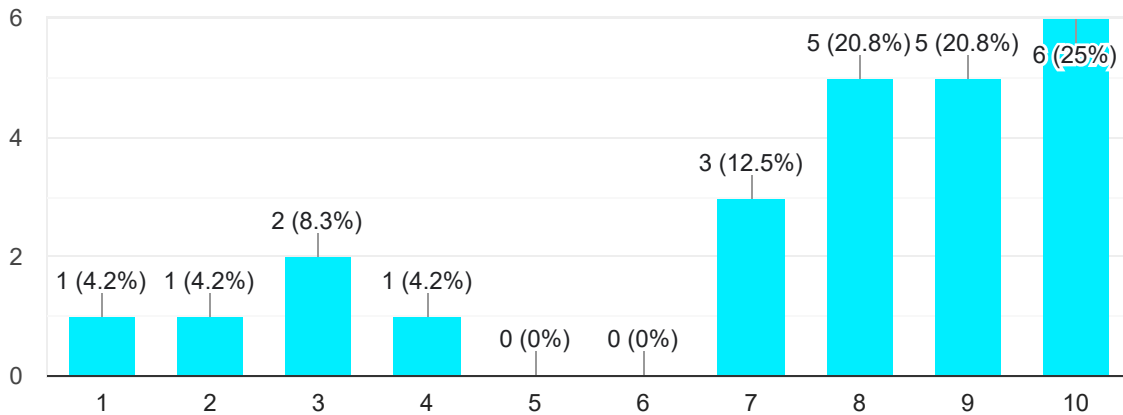
24 responses

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How was your experience with this year's TOT grant application process?

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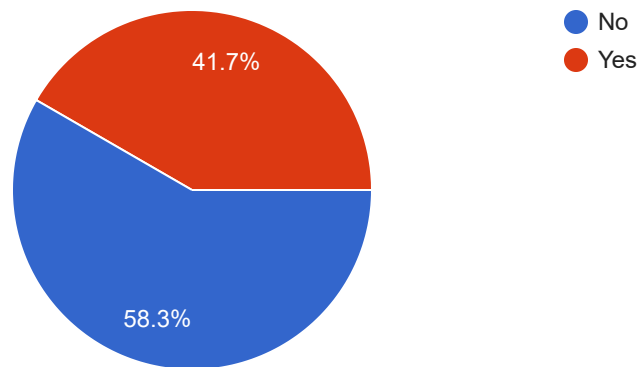
24 responses



Was the application a challenge for your organization to complete?

[Copy](#)

24 responses





If yes, please explain the challenge(s) you encountered.

11 responses

The application is long and onerous. Across philanthropy, best practices for grantmaking organizations suggestion shorter applications and multi-year grants. This allows small organizations to spend more time on programming and less time on grant writing and grant reporting. It also reduces the workload for the staff who are responsible for grantmaking. Appropriate oversight and accountability can still be achieved with shorter applications and multiyear grants.

there was not a process of the right clarification and support on my cultural language to make sure the preses of what we were proposed.

Only in part that our event takes place just before the new grant is due. It is hard to have the data and updated budget information for the next year, while finishing up the current year.

I wasn't aware that you had to have received a grant before in order to qualify for a new grant suggestion. There was no feedback about the scores I got in each area, and if I had known that preference was given to those who have gotten grants before, I probably would have tried a different avenue for funding for my project.

There is a lot of projection when attempting to make a new event happen, and if that gets rated at a lower level, that doesn't allow for new projects to happen.

I was not emailed about the first meeting that I was required to attend after submission.

Somehow my email was left off the list and I just happened to have another applicant mention it to me. This made planning for the meetings a bit harder since I did not get the same notice as others.

It would be helpful to have a more simple application or multi-year application for the Facility Operator Grant.

The Budget portion wasn't super clear. If that portion could be revised to improve readability and clarity, the application process would be much smoother.

I think it's always challenging to prepare a grant proposal and gather the financial and statistical information you need, especially when you are a small staff and have to wear multiple hats.

It's pretty straightforward in my opinion!

The application was a challenge, but no more than should be anticipated to compete for available funding.

Some questions seemed duplicative. The budget section could be made simpler. It would be great to emphasize whether there is a priority on cash expenses and cash match or in-kind.

All past TOT grants provided an opportunity for showing partnership letters and related support. This one did not and did not make that clear. When we participated in the zoom

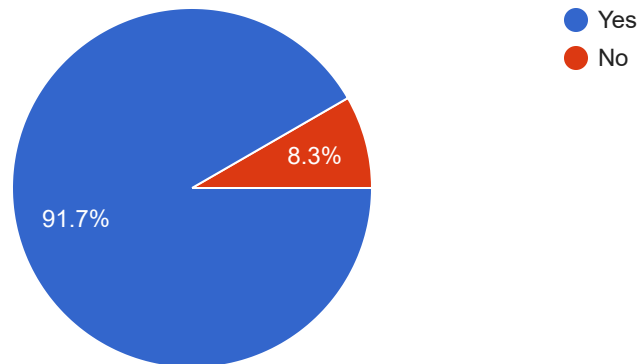


meeting review it was clear that the questions being asked didn't fully understand our partnerships. Some groups were given up to 10 minutes that night to clarify their grants. We did ours in 3 minutes but we knew the partnerships and commitments for support were never seen or recognized.

Did the questions allow you to fully explain your organization/event?

 Copy

24 responses



If no, what question do you wish we would have asked?

3 responses

Why when we asked to be translated our document in Spanish, we didn't have the right support to the last meeting to be asked questions in the language that we were requested to translate the document. we aire asked. in English when we translated the document in Spanish.

I think there is plenty of room and flexibility to explain the event.

Questions related to partnerships and collaborations we thought would be supported by actual letters of support. Instead partnerships were expected to be explained through an organization's website or facebook. We doubt seriously that the committee reviewed websites and facebookes that were broad unless they were specifically focused to the project we submitted. In other words the committee/review process disallowed proper engagement.



## What else can you share with us to improve the application process?

18 responses

We are grateful for TOT funds but want to stress that the TOT grant is the most difficult and onerous application that we have every year. We respect the volunteer hours that TOT board members devote to this process, as well as the hours that City staff devote to TOT, but there really is a better, more streamlined and efficient way to proceed. The world of philanthropy has many examples of best practices that could be a guide for changes to TOT.

The application and reporting take lots of administrative time. I'd be supportive of a more streamlined application, and potentially moving from a reimbursement grant to an award grant. If the committee wanted to explore trust based philanthropy, they may find some ways to lighten the work load for applicants and City admin staff.

I think that there is a need of the system of understand how to support. minorities community groups with their own characteristics in diversity. After covid the society has change a lot and there is a lot of need to really change the characteristics in how to evaluate people or projects and follow the right procedures to go on depth to understand how to support people with more disadvantages to really have a good inclusion and equity. The big barriers is that same that the systems think that people have not right the experience to qualify for the opportunities the community think the same way, the system has not the experience to work with the deepest needs of minorities communities.

The support, evaluation and process to select the grantees, we feel that was not fair. In writing it will hard explain, because we realize with this experience that our disability to communicate by writing how we are working and how we are impacting our minorities communities affected us to qualify for the support.

But we are thankful for the support that we have got in the past years. That helped us a lot to continue to open spaces for conversations with key community members who are taking time to work very close with us and through this process they better undertaking our misión and this facilitated our work to continue to promote equality and inclusion in a deepest way.

Nother in suggest

The information or specific feedback on the scoring decisions would be great. As it is, it seems a bit subjective. If I were able to get specific feedback, then I maybe I could make changes needed for future applications. Or maybe for first time applicants, if their project is to be considered, then there could be an initial review with feedback and chance to rewrite prior to final submission. As it is, I have no idea how to improve my grant application or what was missing according to those who were providing scores.

This year was the best year yet. Thank you to the board for all the time they put in.

I don't think you need to change anything. Seemed to work fine for me.

None.



Had I not attended the Zoom meeting, I would not have known if my organization was going to receive funding for next year and for how much. Perhaps this information could be communicated (at least unofficially) sooner than June.

I think you all do a great job, and we appreciate your efforts!

It would be great if the application deadline was after the first of the year instead of November since the actual authorization of the budget isn't until May or June, and it seems like it only takes 3-4 months to complete the process and make recommendations.

Your application process is not intimidating, and the staff is helpful and willing to answer questions.

I again encountered issues with not receiving automated messages to my e-mail address (I know I have an old e-mail provider), though I plan to use a different e-mail address next application cycle.

I heard a lot of questions from the judges centered around outreach to underserved communities and inclusivity... however, I do not remember there being a specific question centered around that in the application. For that reason I centered my explanation around bringing people to Salem, since it is a tax generated by tourists and travelers. If the inclusivity and active outreach is a key part of the decision making, I would make sure there is verbiage asking about how our organization works to achieve this goal.

Otherwise, I think the questions and process were pretty straight forward and made sense!  
Thank you!

Information about the timeline on funding decisions could be more transparent. It was hard to find information on your website or in minutes that specified when the applicants could expect news about funding decisions.

The more we can hyperlink from the application to the manual and vice versa the better. Would be nice in the application to note the value of questions and link to the info on that in the manual.

Make application downloadable to create a copy for your draft version.

Where we list annual attendance it would be good to include what that number is based on and possibly have options to list numbers like gardens separate from museum or events and museum, etc.

The manual said 10k for cap ex, but I found out it was actually 20k option.

What if question 16 in Facility Application gave you the option to respond after each one of the items rather than having to repeat each item as you answer in #17.

- Include Word Count for each section.

This process has come so far in the past 8 years! Bravo for all the enhancements.

Consider eliminating the need for an in-person meeting to answer questions as the application should contain all necessary information. Or make the questions asked similar from one applicant to all. Overall, however, the process went well. It was the first time for my organization to apply.



All past application processes prior to 2024 were excellent and provided an opportunity to show collaboration and support. At this time, we feel discriminated against because our website and facebook cover all of our projects not just the ones we submitted for review. Moreover, we feel discriminated against because state of Oregon's support for our programs and the efforts to save the tour vessel were ignored. Travel Oregon's Director wrote a very supportive letter which the committee never saw. Meanwhile we watched certain groups being able to give 8-10 minutes of commentary about their grants which were insufficiently prepared with the committee. Salem will lose the vessel and it's potential for tourism and involvement in the community. It is this committee's fault that better consideration was not given to a project that would have kept the vessel in Salem, operating for the benefit of Salem. We are very dissatisfied that no support letters or partner information could be presented. TOT's processes in the past were honest, had integrity and were inclusive. If DEI is an objective of Salem, it has failed here. Staff support from Chris Neider has always been excellent. You're going to lose your riverside asset and it could've been saved whether the city owned it or not. It could've still continued as Salem's asset. We are happy to talk about these things but we are not happy. We have never been ranked at the bottom of a grant process. This whole thing has been insulting. We expect a response about our concerns. Letter from Todd Davidson is being sent separately in email. It was not allowed in your process



Please provide the name of your organization below, unless you would like to remain anonymous. Thank you for your participation!

21 responses

Salem Art Association, Matthew Boulay

ENLACE Cross-Cultural Community Development Project

Theatre 33 at Willamette University

Hoopla Association

Helping Hands Resources

B-17 Alliance Museum & Restoration Hangar

CreativiTee

Gilbert House Children's Museum

Salem Multicultural Institute

Michelle Cordova

Salem Seekers

Hallie Ford Museum of Art, Willamette University

Capitol City Classic

Willamette Master Chorus

Festival Chorale Oregon

Salem's Riverfront Carousel

Salem Orchestra

Salem Symphonic Winds

Friends of Deepwood dba Deepwood Museum & Gardens

Oregon Artists Series Foundation



Rivers of Life Center contact Jerry Herrmann 503-260-3432 riversoflifecenter@gmail.com

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