Memorandum MIAMI-DADE COUNTY

Date: May 21, 2026

Agenda Item No. 14(B)(2)
July 21, 2026

To: Honorable Chairman Anthony Rodriguez
and Members, Board of County Commissioners

From: Daniella Levine Cava Daniella Levine Cava
Mayor

Subject: Report to Analyze CBO Services Funding – Directive No. 252463

This report is in response to Resolution No. R-1174-25 which was co-prime sponsored by Commissioner Natalie Milian Orbis and Senator Rene Garcia and adopted by the Board of County Commissioners (Board), on December 2, 2025. Additionally, the Resolution was amended by the Senator, to incorporate additional data elements he proposed concerning legacy CBOs, defined as recurring CBO agreements managed by the Office of Management and Budget–Grants Coordination Division (OMB-GC) and primarily related to the provision of health and social services. The resolution directed the County Mayor or Mayor's designee to provide the Board with a report that:

(1) analyzes and summarizes the successes and challenges of the competitive grant application process carried out by the administration pursuant to the directive in Resolution No. R-976-23, and
(2) analyzes the performance and funding of the legacy CBOs (including any additional nonprofit and not-for-profit organizations added to the CBO list over the past several years) within the context of all of the County's grant allocations to community-based organizations, as well as programs and services offered directly by County departments, broken out by funding category (Public Safety; Basic Needs; Children and Adults with Disabilities; Criminal Justice; Elder Needs; Food Program; Health; Immigrants/New Entrants; Special Needs; Workforce Development; Domestic Violence; Children and Educational Support; Women and Family Support; etc.). In particular, the report should address: (a) the geographic reach and scope of services provided by the legacy CBOs within the County; (b) any duplication of services provided by and between the legacy CBOs and as compared with services provided by County departments or by other County grant recipients; (c) how effective the services are being rendered by the legacy CBOs and a description of the performance metrics used by the administration to calculate the effectiveness; and (d) a detailed report of the financial dependency of these organizations on County general funds, in accordance with Resolution No. R-134-25. The report should provide some historical context for how long each organization has received County grant funding and the amount of the grant awards, any other funding the organization receives from the County, and any other funding the organization receives from state, federal, and private funds. The report should also advise of any duplication of officers/staff among multiple legacy CBOs.

This analysis incorporates data derived from the FY 2024–25 CBO Report Card, which forms a foundational performance dataset used to assess organizational compliance, service delivery outcomes, and overall effectiveness of CBOs included in the legacy cohort.

Executive Summary

The report outlines the County's analysis of the most recent competitive CBO grant application process under Resolution No. R-976-23 and the ongoing performance and funding of legacy CBOs. It highlights the successes and challenges of the application process, including applicant participation (518 applications received), reviewer training, and use of web-based technology, as well as the impact of high demand and limited funding that led to the process being discontinued prior to final awards. The report also evaluates 117 legacy CBOs, detailing their geographic reach, scope of services across multiple funding categories, service effectiveness, and financial dependency on County funds, while noting limited duplication of Board members and programs. Findings are based on historical and self-reported data and should be interpreted as approximate rather than definitive.

It is important to note that my administration supports the goal of a dedicated funding stream for CBOs in light of ongoing budgetary constraints, and given the important role they play in delivering services to our most vulnerable residents. This analysis demonstrates that the County's investment in community-based organizations provides significant value by leveraging additional public and private funding, enabling services to be delivered more cost-effectively, and expanding the County's ability to reach vulnerable populations that may otherwise be difficult to serve directly through government programs. Furthermore, we support and encourage the Board's efforts to conduct a deep dive into this subject as budgetary pressures, coupled with external legal challenges from the federal and state levels, make it increasingly difficult to provide this support and address significant and growing needs from our community.

To further support local CBOs as these challenges not only persist but intensify, the Office of Management and Budget (OMB) continues to produce the free weekly *Grant Mail* (more than 26,000 subscribers), provide one-on--one- technical assistance (TA) for agency leaders, and circulate capacity-building bulletins featuring free or scholarship-based opportunities for CBOs. Since the start of 2026, OMB launched *the Office Hours* TA series (57 CBO attendees to date) and has assisted my office in coordinating several new efforts to help CBOs connect with funders: hosting two CBO-funder events reaching 135 CBOs; 22 funders and 114 CBOs; 22 funders, respectively, and scheduling a planned CBO-funder reception. In addition, my administration has engaged directly in listening sessions with the CBO Collaborative, a self-formed- group of 64 CBOs, and encouraged its members to expand their efforts to educate state elected leaders. A special TA meeting was also hosted for the CBO Collaborative featuring the Association of Fundraising Professionals.

To inform and support the Board in making difficult budgetary decisions, the administration encourages the Board to consider the following:

1. Continue advocacy at the federal and state level for adequate funding to address human and social service needs in the community and flexibility for local government to effectively fill in the gaps and meet unique, emerging, and urgent needs.
2. Explore alternative potential sources of dedicated revenue streams for human and social services funding.
3. Consider the broader mix of County and non-County funding and services available in the community in making challenging investment decisions.
4. Establish funding priorities by funding category or service type to guide resource allocation given ongoing fiscal constraints, ensuring that limited funding can be directed toward programs demonstrating the highest level of need and community impact.

CBO Grant Application Process

Pursuant to Resolution No. R-976-23, the Community-Based Organization (CBO) Grant Application Process for Human and Social Services (CBO2425) was designed to distribute grants to nonprofit 501(c)(3) organizations for critical human and social services, through an open, competitive process, separate from other County funding opportunities for CBOs (e.g., the annual budget process, district-level discretionary allocations, state and federal awards sub-allocated by the County to local CBOs, etc.). Subject to annual appropriations by the Board, it was anticipated that a total of $15,441,400 would be allocated annually for a three-year cycle, with individual awards ranging from $25,000 to $600,000. Organizations were allowed to submit up to four applications, one per funding category (below), with combined requests not to exceed $600,000.

Funding priorities were informed by stakeholder input (from CBO leaders, subject advisors, and residents), a review of updated census data, and identification of potential overlap with major County and community initiatives (e.g., efforts of the Miami-Dade County Homeless Trust, the former Community Action and Human Services and Juvenile Services Departments (now merged as the Community Services Department), the Peace and Prosperity Plan, the Housing and Community Development Department, the HOMES Program (emergency rent, mortgage, and utilities), and the Coordinated Victims Assistance Center (CVAC); as well as the Miami-Dade County

Community Violence Intervention Initiative in partnership with the Carrie Meek Foundation, Miami-Dade County's continued response to youth violence in collaboration with Miami-Dade County Public Schools, commitments made by Miami-Dade County and The Children's Trust to the Together for Children Partnership, and the portfolio of community grant making efforts by The Children's Trust.

The four funding categories for this process, and the percentage of anticipated total funding available per area, adopted by the Board were as follows: **Basic Needs and Personal Emergencies – 25%** (e.g., bulk food distribution programs, homelessness supports, benefits navigation, and legal services); **Education Supports – 25%** (e.g., childcare, early education/school readiness, academic success, student enrichment, and lifelong learning for adults, older adults, and people with disabilities); **Health and Well-Being – 38%** (e.g., health prevention and intervention, mental health, and home-based care for older adults and people with disabilities); and **Public Safety Supports – 12%** (e.g., child abuse/foster care supports, domestic violence, human trafficking, gun violence and crime, and reentry programs).

The process launched December 1, 2023, and accepted applications through January 31, 2024. A total of 518 applications were received requesting a cumulative total of $124,631,734. Eighteen applications were withdrawn for noncompliance, leaving 500 for review. A total of 221 internal and external reviewers were appointed to four Evaluation and Selection Committees (aligned with funding categories) comprised of 30 smaller review teams. Sixteen training sessions were held, and 100% of reviewers were trained and screened for conflicts prior to receiving their assignments. Each application received five reviews, totaling 2,500 final reviews, with five sets of scores per application averaged to generate a final recommended score for each application. Thirty-six meetings were convened to discuss preliminary scores and funding budget recommendations. Due to the financial constraints of the FY 2025-26 budget process, and as expressed in the second change memo, it was recommended that the process be cancelled and all applications received in response thereto rejected. Following the Board's adoption of the FY 2025-26 Budget, all applicants were notified in writing of the cancellation, and applicant scores were shared with CBOs upon request.

Successes:

1. **New technology improved the process.** The application process was transitioned from a paper-based process to a web-based platform, enabling online applications, reviews, and scoring, as well as improving access to materials for all, and improving staff ability to manage data. Had the process continued, the collection of outcomes data in the applications was designed to support future tracking and reporting of aggregate results.

2. **Procedural updates were implemented and Implementing Order No. 3-15 was revised.** Revisions included updating the contract template to remove unnecessary insurance requirements, adjusting the timing of (and reducing the number of) due diligence reviews required, identifying a new procedure to redirect returned funds to other service-capable CBOs, and identifying a new contract requirement that would engage CBOs in advance as partners in County emergency management efforts.

3. **Promotion, reach, and participation was strong**. 518 applications were submitted from all 13 Commission Districts, with 73% from organizations not previously receiving recurring CBO funding. Outreach included OMB's weekly Grant Mail (over 26,000 subscribers), social media, a mass email distribution campaign, and communications coordinated with County departments and community partners.

4. **Streamlined structure of funding categories and maximum funding amounts provided opportunities for new and currently funded CBOs.** Nearly all currently funded CBOs (94%) submitted applications. Fewer, but broader, funding categories accommodated programs and services that may have evolved significantly since initial allocations as well as emerging best practices. Streamlined categories and funding caps encouraged CBOs to prioritize and combine various program activities (which may have helped to control the number of applications to be processed by the County).

5. **Opportunities for grassroots organizations were enhanced.** Larger CBO applicants were incentivized (via extra points) to include less developed CBOs within their applications. Had the process continued, an estimated 15–20 grassroots CBOs could have been engaged in “Development Partner” relationships. Fiscal sponsorship options were also allowed.

6. **Applicant technical assistance was significantly expanded.** It included five Pre-Application Conferences (in-person and online, including an English/Spanish option), 14 new technical assistance (TA) sessions, and a new online resource library with recorded TA sessions and detailed guides.

7. **Committee expertise was diverse.** Committee members (reviewers) represented a broad range of relevant backgrounds and professional and lived experience, including health, education, social services, budgeting, financial management, grant management, and more. Additionally, 66% indicated they were parents, 45% had caregiving experience for older adults, and 20% had cared for a person with a disability – all lending additional insights regarding the needs of residents and potential services.

Challenges:

1. **The size and scope of the process was expansive and resources limited.** With 518 applications across multiple issue areas, 221 reviewers were needed, with expertise to cover multiple issue areas. Every step of the process stretched existing resources (people, time, facilities, etc.) making it especially difficult to manage reviewer scheduling conflicts and triggering challenging re-assignments.

2. **In-person meetings for Evaluation and Selection Committee members strained recruitment and limited participation**. Identifying and recruiting a sufficient number of non-conflicted volunteer reviewers was a significant challenge due to the overall time commitment of reviewing applications and attending at least two in-person meetings. Scheduling conflicts emerged across nearly every review team. Volunteer reviewers contended with lengthy commute times to attend review team meetings (scheduled in 4-hour slots to ensure all applications assigned to a team would be discussed at one time, by the same reviewers and under the same conditions). Although assigning two alternate reviewers to each review team mitigated issues, alternates were not enough to avoid having to re-assign and shift multiple reviewers. Additionally, a severe weather event (flooding) forced cancellation and rescheduling of multiple in-person review team meetings. Re-coordinating volunteer schedules late in the process was difficult. Note that these challenges may have affected applicant participation; few nonprofit applicants attended public review team meetings.

3. **High demand despite limited funding.** Anticipated funding for CBO2425 totaled $15,441,400, far below the total cumulative amount of $124,631,734 requested, covering only 12% of demand and making the process exceptionally competitive. The average amount requested per program exceeded the average allocation at that time. Any potential considerations to seek additional funds were halted due to FY25-26 budget constraints.

4. **Highly competitive process would result in many unsuccessful applications**. Had the process continued, many high scoring applications and a significant number of currently funded CBOs would have remained unfunded. For example, had the average grant size been $125,000 (a round number close to current averages), just 123 (24%) of the applications would have been funded compared to the 227 (44%) that earned high scores (80 or above). More inclusively, 355 (69%) of the applications scored 70 points or more. In this example, three in every four applications would have remained unfunded. It is likely this would have triggered a significant number of formal and informal appeals. With a total of 518 applications, the appeals process could have been overwhelmed.

5. **The likelihood of significant service disruptions.** Given the budgetary constraints the County continues to face, individual CBOs receiving funding through this process would have faced the possibility of not

receiving funding in subsequent years. Interruptions to funding could create service disruptions for the populations and clients the CBOs support.

6. **Maintaining confidence in the review process.** Although the review and scoring of each application by a five-person review team (and two back-up people assigned as alternates) follows standard grantmaking practice, maintaining CBO trust in group scores is an ongoing concern for any process. Applicants who were unsuccessful may have questioned the process and initiated appeals. One common method used by funders to reduce the impact of outlier scores is to drop the highest and lowest scores before averaging the remaining scores. This alternative method was not used in this process because, given the existing number of volunteer reviewers, it would have reduced the number of scores per application from five to three (i.e., five reviewers would have submitted initial scores, two outlying scores would have been removed, and just three scores would have been averaged for a final score). Further, to maintain all five scores per application, it would have been necessary to recruit additional volunteers. As this process was already large and time-constrained, additional recruitment was not viable.

Legacy CBOs Performance and Funding

In Fiscal Year 2024–25, the County, through the Office of Management and Budget – Grants Coordination (OMB-GC) division, administered grant funding to 117 legacy community-based organizations (CBOs), as reflected in Attachment A to this report. These organizations deliver services across a wide range of funding categories, including Anti-Violence; Basic Needs; Children and Adults with Disabilities; Children, Youth & Families; Criminal Justice; Elder Needs; Food Programs; Health; Immigrants and New Entrants; Other; Special Needs; and Workforce Development. This report, based on historical, self-reported, and publicly available data, identifies the geographic reach and scope of services, any duplication of services, service effectiveness and performance metrics, financial dependency on County funds, and any duplication amongst CBO staff and Board Members.

(a) Geographic Reach and Scope of Services. As detailed in Attachment A of this report, of the 117 funded legacy CBOs, 65 provide services on a countywide basis, offering programs accessible to residents regardless of commission district, while the remaining 52 organizations operate within specific commission districts or defined geographic areas. These district-based organizations typically focus on localized needs or specialized populations and generally serve one or more commission districts rather than the entire County. The geographic information in this report is based on CBO self-reported data regarding the service areas outlined in their executed contract agreements.

(b) Duplication of Services. Services provided by legacy CBOs were reviewed to assess potential duplication among the organizations themselves. This review identified instances in which multiple legacy CBOs deliver similar services within the same funding category and, in some cases, within overlapping geographic areas. Such overlap is not uncommon and often reflects a natural redundancy to ensure service availability, geographic coverage, and sufficient capacity to meet resident needs. Despite these similarities, direct duplication of services among the legacy CBOs was not identified, as each organization operates under a distinct scope, service model, and target population.

Separately, an analysis was conducted to determine the extent of any overlap or duplication with services provided directly by County departments or by other County-funded entities. As part of this review, County departments were provided with a list of the 117 legacy CBOs and the services for which they receive funding and were asked to identify any overlap with departmental programs or contracts.

The Parks, Recreation and Open Spaces Department (PROS) identified limited programmatic overlap between certain legacy CBO services and programs either provided directly by PROS or funded through its contracts. Specifically, PROS noted that it provides programs and activities for active older adults in a manner similar to three elder needs providers: Little Havana Activities & Nutrition Centers of Dade County, Inc.; Michael-Ann Russell Jewish Community Center, Inc.; and Senior L.I.F.T. Center, Inc. While these programs share similar objectives, they differ in program design, service delivery approach, geographic service areas, and participant populations, and therefore are not considered duplicative.

PROS also identified children's programming offered through its Fit2Lead Internship Program that may be similar in nature to programming provided by 27 funded legacy CBOs. Although these programs may fall within the same general service category, they are delivered through different models, serve different communities, and are expected to reach different children.

In addition, PROS identified two funded disability service providers (The Association for Development of the Exceptional, Inc. and Adults Mankind Organization, Inc.) as serving populations that may overlap with those participating in PROS' therapeutic recreation and inclusion programming offered in an adult day care setting. While these services serve similar populations, the scope and purpose differ, as the legacy CBOs focus on vocational training and job skills development, whereas PROS' programming emphasizes therapeutic recreation and inclusion.

The Homeless Trust identified a potential overlap involving The Sundari Foundation, Inc., as the organization receives funding from both departments to deliver homeless services. However, the funding streams support distinct components of the program. Homeless Trust funds are allocated for shelter beds, while legacy CBO funding supports supportive services such as counseling, benefits navigation, job readiness, and related assistance. Because the funding sources cover separate and non-overlapping service elements, the support is not considered duplicative.

The Department of Cultural Affairs (CUA) identified instances of organizational overlap where certain entities receive funding from both OMB-GC and CUA. Specifically, the Miami City Ballet's Ballet Bus program receives funding from both departments. OMB-GC provided $30,645 in funding for this program, which covered partial salary and partial travel costs only. The majority of programmatic costs, including overall program delivery, were funded through other sources and not by OMB-GC. As such, OMB-GC's contribution represents a limited allocation of total programmatic costs and does not constitute duplication of services.
CUA also identified Fairchild Tropical Garden as an organization receiving funding from both departments. OMB-GC funding supports salaries for janitorial staff and one gardener, while CUA funding supports general operating and overhead expenses, including artistic salaries and technical production salaries. These distinct funding purposes support different operational needs and do not result in duplicative funding for the same services.

In evaluating both types of potential duplication, the administration also considered the structure of the funding process. Although legacy CBOs may be funded under the same broad service categories, each organization proposes a distinct service delivery model that is reviewed and negotiated as part of the award process. With 12 funding categories and 117 CBOs receiving an average award of approximately $100,000, available funding levels do not support true duplication of services in a manner that would raise concern. Additionally, the County does not take a prescriptive approach to program design, allowing CBOs to tailor services to specific populations, needs, and geographic areas, which further reduces the likelihood of duplicative service delivery.

(c) Service Effectiveness and Performance Metrics. In accordance with Implementing Order 3-15 (IO 3-15), the effectiveness of services is measured using performance metrics established in each organization's executed grant agreement. These metrics are derived from the Scope of Work and are designed to measure program deliverables, achievement of outcomes, administrative compliance, and fiscal accountability. CBOs are required to submit monthly performance reports documenting progress toward contractual deliverables, which are reviewed by OMB-GC staff and validated through record reviews and annual monitoring site visits. Detailed information on each legacy CBO's service metrics and performance for the most recently completed fiscal year is provided in Attachment B.

Pursuant to IO 3-15, OMB-GC conducts an annual performance review of each funded organization and documents the results through the County's "CBO Report Card." The Report Card evaluates organizations across, at a minimum, the following categories: (1) Deliverables and Program Achievement, based on monthly progress reports, sample record reviews, and the organization's performance against contractual deliverables and outcomes; and (2) Administration and Contract Compliance, based on the results of OMB-GC's annual monitoring site visit report and any corrective action plans submitted and approved by the County.

As set forth in IO 3-15, organizations are rated using a green, yellow, or red stoplight scale. A green rating reflects five or fewer instances of non-compliance; a yellow rating reflects more than five instances of non-compliance; and a red rating reflects any instance(s) of non-compliance that merit contract or payment suspension. Organizations are notified in writing of their proposed rating and are provided up to ten days to submit a written response, which is attached to the final Report Card. At the County's discretion, organizations may be required to submit a corrective action plan to address identified deficiencies. Successful completion of an approved corrective action plan may result in a rating improvement from yellow to green or from red to yellow; however, a red rating will not be elevated directly to green during the contract period.

Based on the results of performance reviews, as reflected in the CBO Report Card, or other information that may come to the County's attention, the OMB Director or the Director's designee may, at their sole discretion, suspend payments, terminate a contract, or elect not to renew funding. Grounds for such action may include, but are not limited to, lack of fiscal or program documentation, health or safety concerns, failure to maintain required licenses or background checks, outstanding monies owed to government entities without an approved repayment plan, repeat findings, or placement on a federal, state, or local debarment list.

In some instances, an organization's reported outcomes may exceed the contract target metrics proposed by the organization and approved by the County. These performance measures are established based on historical performance data, funding amount, etc. OMB monitors performance to ensure service deliverables generally meet at least minimum expectations. Where outcomes consistently exceed targets, future contract modifications may be considered to recalibrate deliverables and ensure realistic, measurable performance standards. Conversely, instances of underperformance are reviewed to determine appropriate corrective action and safeguard the effective use of County funds.

(d) Dependency on County Funding. In accordance with Resolution No. R-134-25, an analysis of legacy community-based organizations (CBOs) financial dependency on County general funds was conducted. The analysis focused on allocations made during Fiscal Year (FY) 2024-25 and did not include federal or state pass-through funds. As part of this review, staff examined each organization's most recent audited financial statements and/or IRS Form 990.

Providing a complete and precise determination of organizational financial dependency presents inherent challenges due to differences in fiscal years across the CBO portfolio. Of the 117 funded legacy CBOs, 113 operate on fiscal years that do not align with the County's fiscal year. As a result, the County does not maintain comprehensive organizational financial data aligned to a common reporting period that would allow for an exact calculation of dependency across all organizations.

Accordingly, publicly available financial information was utilized to develop high-level estimates based primarily on County grant award amounts relative to total organizational revenues as reported in audits and Forms 990. These estimates should be interpreted as approximations and not as definitive measures of financial dependency. In addition, financial audits and Forms 990 do not consistently disaggregate revenue sources by County, state, federal, and private funding, further limiting the precision of the analysis. Depending on the reporting period used by a CBO, this may result in an overstatement (greater than 100%) or understatement of reliance on County general funds.

Subject to these limitations and as detailed in Attachment A, 109 organizations (approximately 93 percent) receive less than 50 percent of their total funding from County general funds, including 78 organizations (approximately 67%) that receive less than 10 percent of their funding from the County. An additional six organizations (approximately 5 percent) receive between 50 and 75 percent of their revenue from County general funds, while eight organizations (approximately 7 percent) receive between 75 and 100 percent of their total revenue from County general funds.

To provide historical context regarding County funding, data was collected from prior years' budget documents to identify the length of time each legacy organization has received County grant funding. Limitations of this review include inconsistencies in how funding data is presented across budget years, which required staff to rely on the earliest available reference for each organization. In some cases, this may not reflect the actual initial year of funding. Additionally, some organizations received funding through predecessor initiatives that later became part of the legacy CBO program, and organizational name changes over time further complicate historical tracking. As such, this information should be viewed as providing a general historical overview rather than a definitive funding chronology.

As detailed in Attachment A, the review identified six organizations that have received County funding for more than 25 years, with funding histories dating back to at least 1998. The majority of legacy CBOs, however, first received County funding in FY 2009, when 78 of the 117 currently funded organizations were initially awarded allocations. Additional organizations entered the funding portfolio in subsequent fiscal years through the annual budget process.

Board or Staff Duplication. Finally, an analysis was conducted to determine whether there is any duplication of officers or staff among multiple legacy CBOs. This review focused on staff positions funded through OMB-GC-approved budgets for FY 2024-25 and did not include all personnel employed by each organization. No individuals were identified as being concurrently funded through OMB-GC across multiple legacy CBOs. Limited overlap was identified among board membership, with 17 individuals out of a total of 1,562 board members reviewed serving on more than one legacy CBO board as shown in Attachment C. Data was collected from CBO board rosters provided in October 2025 and may not reflect subsequent changes.

This report will be placed on the next available Board Agenda pursuant to Rule 5.06(j). Should you have any questions or require additional information, please do not hesitate to contact Daniel T. Wall, Assistant Director, Office of Management and Budget at 305-375-5143.

Attachments - https://www.miamidade.gov/resources/management/documents/cbo-legacy-report-attachments.pdf

C: Geri Bonzon-Keenan, County Attorney
Jess M. McCarty, First Assistant County Attorney
Office of the Mayor Senior Staff
Department Directors
Daniel T. Wall, Assistant Director, Office of Management and Budget
Christina M. Cicilia, Director, Office of Policy and Budgetary Affairs
Yinka Majekodunmi, Commission Auditor
Basia Pruna, Director, Clerk of the Board
Eugene Love, Agenda Coordinator