

*The Office of Equity Presents*

# ALLOCATION REQUEST BEST PRACTICES

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## Fiscal Year Planning

Please submit your fiscal year plan in advance to ensure your agency receives timely funding. A single representative from your finance department or team should complete the submission on behalf of the entire agency, including detailed information for each workgroup.

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## Flexibility for Supplemental Requests

While the main goal is to allocate funds based on your fiscal year plan, we understand that additional needs may arise. If your agency needs to form a new workgroup or requires extra funding later in the year, you can submit a supplemental request. The application process is designed to accommodate these rolling requests.

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## Review & Approval Process

After submission, the Community Compensation Team will review your request for initial or supplemental funds. If approved, OFM will issue a memo and release the allocated funds to your agency. If denied, you will receive a letter detailing which workgroup(s) were denied and the reasons why (i.e. supporting materials do not match the information provided in the form).

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## Quarterly Check-Ins

For Fiscal Year 2025, agencies must conduct quarterly check-ins by November 20th, 2024, January 20th, 2025, April 20th, 2025, and June 20th, 2025. During these check-ins, agency representatives will report on fund utilization, workgroup attendance, compensation details, and reimbursements (including child/adult care, lodging, travel, and per diem). Note that these quarterly check-ins will replace the end of the year reporting requirements. Regular check-ins help the Office of Equity monitor fund usage effectively.

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## Eligibility for Future Funding

Agencies must comply with quarterly reporting and provide demographic information to remain eligible for future funding. Non-compliance may affect your eligibility for subsequent allocations. If your agency has surplus funds that are no longer needed, please let the Office of Equity's Community Compensation team know so they can return them to the general pool for reallocation to other agencies.



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