



NOTICE OF FUNDING OPPORTUNITY (NOFO) INFORMATION GUIDANCE

Financially Assisted Agencies (FAA)
Securing Our Future Initiative (SOFI)
FY 2021 - FY 2022
(October 1, 2020 - September 30, 2022)

Released: October 26, 2020

Due date: November 9, 2020 at 5:00:00 PM EST

Palm Beach County Board of County Commissioners (BCC)
Community Services Department (CSD)
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READ CAREFULLY AND COMPLY WITH ALL REQUIREMENTS

IN ACCORDANCE WITH THE PROVISIONS OF THE ADA, THIS NOFO AND DOCUMENTS LISTED CAN BE REQUESTED IN AN ALTERNATE FORMAT. AUXILIARY AIDS OR SERVICES WILL BE PROVIDED UPON REQUEST WITH AT LEAST THREE (3) DAYS NOTICE. PLEASE CONTACT CSD AT (561) 355-4718 OR AT CSD-FAAREP@PBCGOV.ORG.

SECTION I: GENERAL INFORMATION

INTRODUCTION

Palm Beach County Community Services Department (CSD) invites eligible entities to submit proposals for the Financially Assisted Agencies (FAA) Securing Our Future Initiative (SOFI) for Fiscal Years 2021 - 2022 (October 1, 2020 – September 30, 2022). Proposed SOFI programs will participate in the system of care to build or create pathways for economic mobility for families with children ages 0-18 who are living below 200 percent of the federal poverty level (FPL) with a special emphasis on families that are at 100 percent or below FPL.

BACKGROUND

Palm Beach County Board of County Commissioners (BCC) established the FAA program within the Palm Beach County Administrative Code Section 305.07 - Payments to Financially Assisted Agencies in the early 1980s to augment the County's own service mix to address human service needs by providing financial assistance to community-based organizations. The Health and Human Services (HHS) Element of the *Comprehensive Plan of Palm Beach County* delineates goals and objectives that address the availability of health and human services necessary to protect the health, safety and welfare of County residents. In conjunction with the HHS Element, BCC adopted Resolution R-2013-1563, which created the Citizens Advisory Committee on Health & Human Services (CAC/HHS) to provide input on FAA processes. Additional guidance is also provide in *A Report of Health & Human Services in Palm Beach County – Based on Key Community Indicators 2017*, located at:

<http://discover.pbcgov.org/communityservices/Pages/Publications.aspx>.

CSD administers the FAA for Health and Human Services on behalf of the County.

PROGRAM OVERVIEW

Securing our Future Initiative seeks to build or create pathways for economic mobility for families with children ages 0-18 who are living below 200% of the federal poverty level (FPL) with a special emphasis on families that are 100% below FPL.

This is the second NOFO that originated with FY 2020 FAA funds. This second NOFO is being released to request projects in the funding priority of the Securing our Future Initiative.

FUNDING AVAILABILITY

All proposals must be category-specific in service categories that are accepting NOFOs. Applicants are not limited in the number of proposals they may submit. The funding available for this NOFO is determined by the Board of County Commissioners for each fiscal year.

Funding estimated to be available for Fiscal Years 2021 and 2022 is \$177,796 annually for a total of \$355,592. The funds will be distributed annually for each service category as follows:

Economic Mobility – SOFI = \$177,796

ELIGIBILITY

Qualified entities submitting applications for FAA funding shall meet all statutory and regulatory requirements.

Applicants can be nonprofit organizations, states, local governments and instrumentalities of state and local governments. For-profit entities are not eligible to apply for grants or to be sub-recipients of grant funds. All sub-recipients must also meet the eligibility standards as described below.

Organizations will clearly identify how their service/program(s) address the Service Categories and system of care as approved by the Board of County Commissioners.

Nonprofit Applicants must:

- Hold current and valid 501(c)(3) status as determined by the Internal Revenue Service.
- Be chartered or registered with the Florida Department of State, have been incorporated for at least one agency fiscal year, and have provided services for at least six (6) months.
- Create a Vendor Registration Account OR activate an existing Vendor Registration Account through Palm Beach County Purchasing Department's Vendor Self Service (VSS) system, which can be accessed at <https://pbcvssp.co.palm-beach.fl.us/webapp/vssp/AltSelfService>. If Applicants intend to use sub-recipients, Applicants must also ensure that all sub-recipients are registered as agencies in VSS.
- Demonstrate accountability through the submission of acceptable financial audits performed by an independent auditor.
- Maintain contractual liability insurance as listed in [Attachment 9: Insurance](#), if awarded FAA funding.

SECTION II: PROPOSAL SUBMISSION

Applicants shall submit project applications, along with required support materials, through the CSD NOFO submission website, located at:

<https://pbcc.samis.io/go/nofo/>

All documents must be submitted by the deadline date per application instructions.

Late applications will not be accepted or reviewed.

Applicants must submit at least one (1) online application package to be considered for funding.

Proposals for the SOFI were previously received in February 2019 and contracts were awarded. Previously awarded funding has become available again, therefore Community Services is seeking new proposals for the SOFI.

SERVICE CATEGORY

Economic Stability/Poverty

For a complete description of Service Category eligible activities, please refer to the [Recommendations for Services](#) section (page 8).

PUBLISH/RELEASE DATE

Monday, October 26, 2020

DEADLINE DATE

Proposals, submitted through the online application website, must be completed and received by **5:00 PM on November 9, 2020**. Proposals submitted after 5:00 p.m. to the website will not be accepted or reviewed.

TECHNICAL ASSISTANCE

Technical assistance questions must be made in writing and emailed to CSD-FAARFP@PBCGOV.ORG. All questions and answers will be made available for the public to review at:

<http://discover.pbcgov.org/communityservices/financiallyassisted/Pages/RFP.aspx>.

The deadline for submitting questions to CSD is 12:00 PM (Noon) on November 6, 2020, which is one (1) business day before the submission deadline.

CONTACT PERSON

This NOFO is issued, as with any addenda, for the BCC by CSD. The contact for all FAA SOFI application inquiries is by email at CSD-FAARFP@PBCGOV.ORG.

SCHEDULE OF EVENTS/TIMELINE

FY 2021 - 2022 FAA SOFI NOFO TIMELINE

DATE	ITEM	RESPONSIBLE
October 8, 2020	Citizens Advisory Committee on Health and Human Services (CAC/HHS) information update on NOFO process	CSD CAC/HHS
October 23, 2020	SOFI Interest Meeting via Zoom	CSD
October 26, 2020	FAA SOFI NOFO Release Day - Available for Public	CSD
October 30, 2020	SOFI Reviewer Training	CSD
November 6, 2020	Final day to submit written questions 12:00 PM (Noon)	Applicants
November 9, 2020	FAA SOFI NOFO PROPOSAL SUBMISSION DEADLINE - 5:00 PM	Applicants
November 16, 2020	Economic Mobility – SOFI	CSD

	Review Panel meets to review and score proposals	Reviewers
November 17-18, 2020	Staff reconciles review panel rankings and funding availability to develop recommended allocations	CSD
November 23, 2020	Funding Recommendations Posted on FAA Website	CSD
December 4, 2020	Final date to file a Funding Grievance – 7 Business Days following Funding Recommendations Posted on FAA Website	Applicants
February 2021	BCC Contract Approval	BCC

EXPENSE OF PROJECT APPLICATION

All expenses incurred with the preparation and submission of proposals to the County, or any work performed in connection therewith, shall be borne by applicants. No payment will be made for proposals received or for any other effort required of or made by applicants prior to commencement of work as defined by an agreement approved by the BCC.

PROJECT APPLICATIONS OPEN TO THE PUBLIC

Applicants are hereby notified that all information submitted as part of, or in support of, FAA SOFI applications will be available for public inspection in compliance with the Florida Public Records Act.

CONE OF SILENCE

This NOFO includes a Cone of Silence. The Cone of Silence will apply from the date the NOFO is due back to the department, which is November 9, 2020, until the final FAA contract agreements are approved by the BCC.

All parties interested in submitting a proposal will be advised of the following:

Lobbying - Cone of Silence

Respondents are advised that the "Palm Beach County Lobbyist Registration Ordinance" (Ordinance) is in effect. A copy of the Ordinance can be accessed at:

http://discover.pbcgov.org/legislativeaffairs/Pages/Lobbying_Regulations.aspx

The Respondent shall read and familiarize themselves with all of the provisions of said Ordinance, but for convenience, the provisions relating to the Cone of Silence have been summarized here. **"Cone of Silence" means a prohibition on any non-written communication regarding this NOFO between any Respondent or Respondent's representative and any County Commissioner or Commissioner's staff any member of a local governing body or the member's staff, a mayor or chief executive officer that is not a member of a local governing body or the mayor or chief executive officer's staff, or any employee authorized to act on behalf of the commission or local governing body to award a contract.** A Respondent's representative shall include but not be limited to the Respondent's employee, partner, officer, director or consultant, lobbyist, or any, actual or potential subcontractor or consultant of the Respondent.

The Cone of Silence is in effect as of the submittal deadline. The provisions of this Ordinance shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before

selection committees, and contract negotiations during any public meeting. The Cone of Silence shall terminate at the time that the BCC awards or approves a contract, when all proposals are rejected, or when an action is otherwise taken that ends the solicitation process.

SECTION III: SCOPE OF SERVICES

TERMS OF SERVICE

FAA SOFI Funding Term: 12 months, automatically renewable for up to one (1) additional 12-month period
FAA SOFI Start Date: October 1, 2020
FAA SOFI End Date: September 30, 2022

Contract agreements shall be dependent on BCC allocations each year unless otherwise noted in the funding priority description.

TERMS AND CONDITIONS

1. Proposal Guarantee

Proposer guarantees their commitment, compliance and adherence to all requirements of the NOFO by submission of their proposal.

2. Modified Proposals

Proposer may save any unfinished proposal and continue to modify the proposal until the proposal is submitted. Once submitted, the proposal is final.

3. Late Proposals, Late Modified Proposals

Proposals and/or modifications to proposals submitted after the deadline are late and shall not be considered.

4. Palm Beach County Office of the Inspector General Audit Requirements

Palm Beach County has established the Office of the Inspector General in Palm Beach County Code 2- 421 through 2-440, as may be amended, which is authorized and empowered to review past, present and proposed County contracts, transactions, accounts and records. The Inspector General has the power to subpoena witnesses, administer oaths and require the production of records, and audit, investigate, monitor, and inspect the activities of the AGENCY, its officers, agents, employees, and lobbyists in order to ensure compliance with contract requirements and detect corruption and fraud. Failure to cooperate with the Inspector General or interference or impeding any investigation shall be in violation of Palm Beach County Code 2-421 through 2-440, and punished pursuant to Section 125.69, Florida Statutes, in the same manner as a second degree misdemeanor.

5. Commencement of Work

The County's obligation will commence when the contract is approved by the Board of County Commissioners or their designee and upon written notice to the proposer. The County may set a different starting date for the contract. The County will not be responsible for any work done by the proposer, even work done in good faith, if it occurs prior to the contract start date set by the County.

6. Non- Discrimination

The County is committed to assuring equal opportunity in the award of contracts and complies with all laws prohibiting discrimination. Pursuant to Palm Beach County Resolution R2017-1770, as may be

amended, the Applicants warrants and represents that throughout the term of the Agreement, including any renewals thereof, if applicable, all of its employees are treated equally during employment without regard to race, color, religion, disability, sex, age, national origin, ancestry, marital status, familial status, sexual orientation, gender identity or expression, or genetic information. Failure to meet this requirement shall be considered default of the Agreement.

As a condition of entering into the agreement, the Applicants represents and warrants that it will comply with the County's Commercial Nondiscrimination Policy as described in Resolution 2017-1770, as amended. As part of such compliance, the Applicants shall not discriminate on the basis of race, color, national origin, religion, ancestry, sex, age, marital status, familial status, sexual orientation, gender identity or expression, disability, or genetic information in the solicitation, selection, hiring or commercial treatment of sub-contractors, vendors, suppliers, or commercial customers, nor shall the Applicants retaliate against any person for reporting instances of such discrimination. The Applicants shall provide equal opportunity for sub-contractors, vendors and suppliers to participate in all of its public sector and private sector sub-contracting and supply opportunities, provided that nothing contained in this clause shall prohibit or limit otherwise lawful efforts to remedy the effects of marketplace discrimination that have occurred or are occurring in the County's relevant marketplace in Palm Beach County. The Applicants understands and agrees that a material violation of this clause shall be considered a material breach of the agreement and may result in termination of the agreement, disqualification or debarment of the company from participating in County contracts, or other sanctions. This clause is not enforceable by or for the benefit of, and creates no obligation to, any third party. Applicants shall include this language in its sub-contracts.

Additional terms and conditions will be included in the program agreement and are contained on the FAA website, as **FAA Standard Terms and Conditions**, located at:

<http://discover.pbcgov.org/communityservices/financiallyassisted/Pages/RFP.aspx>

RECOMMENDATIONS FOR SERVICES: ECONOMIC STABILITY/POVERTY PALM BEACH COUNTY

Qualified entities are invited to submit applications to provide SOFI services to Palm Beach County residents. The Review Panel will rank all proposals based on how critical they deem the program is for the system of care. The SCORE awarded to a proposal is reflective of how competitive the proposal is. The RANKING of the proposals is reflective of how imperative and critical the services are to ensure availability and access. Ranking will be based on priorities established through the Birth to 22 meetings and community conversations that occurred in October 2018. The SOFI program was developed, in part, on these two important community events and remains the same today as when it first started.

See [Attachments 2 and 3](#) for the priority guidance that the reviewers will use for the review process.

Funding Priority for FY 2021 – 2022 FAA SOFI NOFO Rerelease

Priority #2 Economic Mobility - Securing Our Future Initiative (SOFI)

Strategy #1 Build or create pathways for economic mobility for families with children ages 0-18 that increase wages and maintain the increase over time.

Priority Description

Vision

A system of care that maximizes opportunities for economic mobility

Mission

To collaborate with community stakeholders to create an ecosystem that supports innovative systemic change leading to increased economic mobility for low-income families

Guiding Principles

We believe:

1. That poverty is everyone's problem
2. In finding solutions WITH people not FOR people
3. That poverty is a moral AND economic imperative
4. In shared prosperity for all

Goals

SOFI seeks to build or create pathways for economic mobility for families with children ages 0-18 who are living below 200 percent the federal poverty level (FPL) **with a special emphasis on families that are 100 percent or below FPL.**

The goals for this initiative are to:

1. Assist 188 households annually with services that will increase their household income above 100 percent of FPL and to maintain or improve this income level for a minimum of two years.
2. To create a path that enables families who are earning above 100 percent of poverty but below the living wage (200 percent FPL/ALICE Threshold) to increase their household income above the living wage.
3. To accelerate the building of an integrated Health and Human Services System of Care to create more seamless, effective and sustainable interventions that will assist stakeholders in identifying and removing structural & systemic barriers (i.e. fiscal cliff) that prevent families from advancing economically.

Program Description

See [Attachment 4 and 5](#) for program description and chart.

Requirements

Agencies that are serving households participating in SOFI must:

- Serve Households with a child between 0-18 within the household.
- Ensure household adults have the ability to work.
- Determine eligibility for households and ensure their total household income is at or below 200 percent

of FPL with emphasis on 100 percent and below.

- Ensure the client is enrolled in the Employ Florida Database.
- Ensure the client is enrolled in the Homeless Management Information System (HMIS).
- Ensure that clients participate in orientation/community group session.
- Ensure that clients complete a needs assessment using an assessment tool provided by Community Services Department (currently VI-SPDAT) at least two times a year to measure economic mobility over time.

Features

The ranking guide will give priority to agencies that indicate on their proposals their willingness to serve families:

- Earning 100 percent **and** below FPL
- Who reside in high poverty neighborhoods (See [Attachment 3](#))
- Who are users of multiple systems (i.e. TANF, SNAPs, Housing Subsidies, Homeless Families or Families at Risk of Homelessness, Medicaid)

Examples of Projects That May Be Considered Under SOFI

1. A strategic collaboration with agencies that work with families receiving TANF benefits, offering support services that will assist them in gaining and maintaining employment
2. Developing or expanding a social enterprise that will create new jobs for individuals with families living in eligible households (not to supplant existing funding)
3. An initiative assisting families who are/were receiving unemployment benefits to find gainful employment
4. Creating strategic partnerships with a private sector employer that provides employment opportunities for eligible households
5. Assisting individuals within the eligible household to start their own businesses

These are only examples and project proposals are not limited to the above examples. We encourage innovative projects that will accomplish the goals of the initiative.

Examples of Services for SOFI

1. Case Management with an emphasis on job placement (i.e. job placement, employment support etc.)
2. Training that would position the client to increase their wages (excluding trainings offered by CAP and CareerSource) See [Attachment 4](#) for details regarding existing training provided
3. Adult Basic Education, ESOL training
4. Transportation

Services not allowable for SOFI

1. Childcare
2. Trainings offered by CareerSource, CAP or Palm Beach County School District (unless there is a gap)
3. Health Care

Please see the data sources located at:

<http://discover.pbcgov.org/communityservices/financiallyassisted/Pages/RFP.aspx>.

Proposals shall include strategies and interventions that respond to the data provided.

Required Outcome Indicators – Use for logic model

1. % of households served who increase wages through entrepreneurship
2. % of households served who maintain increase in wages through entrepreneurship for 90 days or more
3. % of households served who increase wages through gaining employment
4. % of households served who maintain employment for 90 days or more

Other outputs and outcomes that are required to be tracked

5. % of households served who earn job-relevant licenses, certificates, and/or credentials
6. % of households served who increase their self-sufficiency over a period of 3 years as indicated by the results of the assessment tool used

Definitions

Economic Stability: Increase financial stability for vulnerable populations.

Economic Mobility: Increase wages and maintain wage increase over a period of time so that household income is above the living wage.

Disposable Income: Any income above what is needed for basic living expenses for housing, food and transportation. For vulnerable populations, the deficit for basic living expenses would be lessened; however, there still may not be enough income to meet basic living expenses.

SECTION IV: CONTENTS OF PROPOSAL AND INSTRUCTIONS

The NOFO Guidance as well as additional resources and information are available at:

<http://discover.pbcgov.org/communityservices/financiallyassisted/Pages/RFP.aspx>

<http://discover.pbcgov.org/BusinessOpportunities/Pages/default.aspx>

<http://discover.pbcgov.org/communityservices/Pages/Citizens-Advisory-Committee.aspx>

Paper copies are available upon request.

The FAA NOFO Guidance is for reference purposes only, as the proposal must be submitted through the Palm Beach County Community Services Department Submission website.

Except where noted, all agencies applying for SOFI funds must complete and submit all items listed below.

The deadline for application package submission is **Monday, November 9, 2020 by 5:00 PM**. For consideration, Application Packages shall be submitted on the Palm Beach County, Community Services Department NOFO Application Submission Website:

<https://pbcc.samis.io/go/nofo/>

Applications can be revised prior to final submission. Once submitted, applications cannot be changed.

Applications must (be):

- Written in plain language in a narrative that fully addresses all questions in the FAA SOFI NOFO Guidelines.
- Understandable to people unfamiliar with the agency or its area of expertise.
- Specifically addresses the funding priorities set out in this NOFO

Please refer to this FAA SOFI NOFO guidance for further description or definitions.

FAA Review Committee meeting is scheduled to take place on **Monday, November 16, 2020 at 1:00 PM to 5:00 PM** using WebEx (Online). Please check the FAA website for changes to the meeting location.

<https://pbc-gov.webex.com/pbc-gov/j.php?MTID=mdabcf3dbcfdb9fd8fe38d6bef33a1764>

Meeting number/Access Code: 172 068 5078

Password: 1234

Join by phone: 1-904-900-2303 United States Toll
1-844-621-3956 United States Toll Free

Members of the public who plan to attend the meeting in person are asked to please notify FAA, as soon as possible at CSD-FAARFP@PBCGOV.ORG or call (561) 355-4718.

Communication Media Technology (CMT) may be accessed at the following location, which is normally open to the public at 810 Datura Street, West Palm Beach, FL 33401, Basement Conference Room.

People wishing to attend in person may do so at 810 Datura Street, West Palm Beach FL 33401, Basement Conference Room.

Anyone interested in additional information may contact FAA by mail at 810 Datura Street, West Palm Beach, FL 33401, by email at CSD-FAARFP@PBCGOV.ORG, or by phone at (561) 355-4718.

Also, those wishing to make public comments may send your comments via traditional mail to at 810 Datura Street, West Palm Beach, FL 33401 or email at CSD-FAARFP@PBCGOV.ORG.

Public participation is solicited without regard to race, color, national origin, age, sex, religion, disability or family status.

In accordance with the Americans with Disabilities Act (“ADA”), persons with disabilities requiring accommodations in order to participate in this public meeting can contact CSD-FAARFP@PBCGOV.ORG

no later than three (3) business days prior to such meeting.

Persons who require special accommodations under the Americans with Disabilities Act or persons who require translation services for a meeting (free of charge), please call (561) 355-4718 or email CSD-FAARFP@PBCGOV.ORG at least five business days in advance. Hearing impaired individuals are requested to telephone the Florida Relay System at #711.

FY 2021 - 2022 FAA SOFI APPLICATION COMPONENTS

****START A NEW APPLICATION – DO NOT USE AN OLD ONE****

Proposal

Federal ID

Agency Name

Doing Business As (DBA)

Please indicate name(s) by which agency is known or does business.

Address

City

State

Zip Code

NOFO/RFP

Additional Editors

Program Name

FAA Required FY 2021 - 2022 Cover Sheet

Click to download the REQUIRED FAA FY 2021 - 2022 Cover Sheet Template. See [Attachment 1](#). Please upload once you have completed the form.

Please upload your document in the same format as the template: **.doc** OR **.docx**

Please name your document as such: *(Agency Name or Initials)Coversheet_FY21.doc* OR *(Agency Name or Initials)Coversheet_FY21.docx*

NOFO Information Document

Click to download the **FY 2021 - 2022 FAA SOFI NOFO Guidance** document for reference throughout the application.

General Contact Information

CEO/Executive Director Name and Title

CEO/Executive Director Email

Agency Contract Person Name and Title

Agency Contract Person Phone

Agency Contract Person Email

Total Funding Amount Requested

Please enter total funding amount across all service categories that you are requesting.

Total People Expected to Serve

Please enter total number of unduplicated people expected to be served with the funding requested.

Internal Control Questionnaire

Click to download the REQUIRED **Internal Control Questionnaire**. Please upload once you have completed the form. See [Attachment 6](#).

Please upload your document in the same format as the template: **.doc OR .docx**

Please name your document as such: *(Agency Name or Initials)InternalControl.doc* OR *(Agency Name or Initials)InternalControl.docx*

Policies and Procedures

Please upload your agency's policies and procedures.

Please upload your document in the same format as the template: **.doc OR .docx**

Please name your document as such: *(Agency Name or Initials)Policies.doc* OR *(Agency Name or Initials)Policies.docx*

Performance Improvement Plan (2000 Characters)

Please describe how your agency responds to requests for performance improvement plan.

I. Project Narrative (25 Pts)

Economic Mobility-Securing our Future Initiative (SOFI)

1. Clients/Population to be served (1500 Characters)

SOFI is a system of care in which community stakeholders collaborate to maximize opportunities and create an ecosystem that supports innovative systemic change leading to increased economic mobility for low-income families.

- Serve Households with a child between 0-18 within the household.
- Ensure household adults have the ability to work.
- Determine eligibility for households and ensure their total household income is at or below 200 percent of FPL with emphasis on 100 percent and below.
- Ensure the client is enrolled in the Employ Florida Database.
- Ensure the client is enrolled in the Homeless Management Information System (HMIS).
- Ensure that clients participate in orientation/community group session.
- Ensure that clients complete a needs assessment using an assessment tool provided by Community Services Department (currently VI-SPDAT) at least two times a year to measure economic mobility over time.

Describe the clients/population that will be served.

2. Number Served (500 Characters)

List the total number of unduplicated persons that will be served. Specify the number on a monthly and annual basis.

3. Coordination (1500 Characters)

How will your proposed activity coordinate with the current system of care? If your agency has not been

involved, please describe your willingness and timeline for participation.

4. Key Staff (1500 Characters)

Describe key staff that will be working on your project. The description should include position titles, education and experience required. Including specific staff names is optional.

5. Organizational Capacity (4000 Characters)

Describe the capacity of your organization. Include the following in your description:

- Length of time in business
- Length of time undertaking activity for which funding is being requested
- Number of full-time, paid administrative and/or fiscal staff
- Number of full-time, paid programmatic staff
- Number of active volunteers

6. Inclusivity (4000 Characters)

Describe how your agency is (or is working to become more) inclusive and equitable, both in terms of internal practices and programming, and in terms of external partnerships and within the community.

7. Racial Equity (4000 Characters)

What steps has your agency taken or plans to take in order to establish, develop or continue policies, practices, and procedures that increase racial equity in the following areas: Training, hiring and retention, board development, community engagement and partnerships, and other organizational work?

8. Trainings (4000 Characters)

Describe prior or planned efforts to ensure staff receives the following trainings and how they would be incorporated into service delivery:

- Racial Equity Training
- Trauma-Informed Care (TIC), Adverse Childhood Experiences (ACEs), Motivational Interviewing (MI) training
- Cultural Competency/Humility Training
- Lesbian, Gay, Bi-Sexual, Transgender, Questioning (LGBTQ) Cultural Competency

9. How Clients Selected (8000 Characters)

Describe the following for your Securing our Future (SOFI) program:

- How will clients be selected for service(s)? Describe how you will follow the required eligibility guidelines.
- How will the agency partner with the other agencies providing a similar service?
- What types of services will be offered?
- Who will provide the service(s)?

II. Evaluation Approach (15 Pts)

10. FAA Logic Model

Click to download the ROMA Plan/Logic Model. Please upload once you have completed the form. See [Attachment 7](#).

- Ensure outcomes are SMART (specific, measurable, achievable, realistic, time bound).
- Ensure outcomes are reflective of the required outcomes stated in the FAA NOFO Guidance.

Please upload your document in the same format as the template: **.xls OR .xlsx**

Please name your document as such: **(Agency Name or Initials)ROMALM_FY21.xls OR (Agency Name or Initials)ROMALM_FY21.xlsx**

11. Program Evaluation and Best Practices (4000 Characters)

How does your agency use program evaluation and best practice program models to develop and implement the programs that you operate?

12. Overall Evaluation Approach (4000 Characters)

What is your agency's overall approach to building these practices into your programs? Please give an example of a change made to an existing program or a time your agency developed a new program based on a best practice or the results of an evaluation.

III. Prior Outcomes And Response To Community Data (10 Pts)

13. Prior Outcomes (4000 Characters)

Discuss prior outcomes and other relevant data that demonstrates success of the services in this proposal.

Include data for:

- The percent of clients that have increased or maintained their household income in the last year of the program
- The percent of clients that are 100 percent below the Federal poverty level (FPL)
- Describe the demographics and characteristics of the previous population served. Describe where services are provided and the area in which clients live and travel from to receive services.

14. Data Sources (4000 Characters)

Review the data sources provided that demonstrate a need for services in the category you are applying for. Describe how your proposal will respond to the need demonstrated by the data provided. (4000 characters)

IV. Data Management (10 Points)

15. ClientTrack - HMIS (4000 Characters)

How does your agency ensure quality data collection, data entry, and reporting for service programs in ClientTrack, the Homeless Management Information System (HMIS)? If your program is not currently participating in ClientTrack, describe your plan for increasing agency capacity to quickly begin collecting and entering data.

All agencies awarded FAA funds must participate in ClientTrack/HMIS. All clients served with FAA funds must be entered into ClientTrack/HMIS. Funding requires that all clients served be entered and exited in ClientTrack/HMIS during the applicable fiscal year. Agencies must execute the required partner and user agreements with Palm Beach County and must participate in the data sharing of ClientTrack/HMIS on an ongoing basis throughout the term of their FAA contract in order to maintain eligibility for reimbursement. Provisions are in place within ClientTrack/HMIS to protect client confidentiality, yet still report statistical data.

16. Program Changes (4000 Characters)

Provide a specific example of program changes your agency has made based on data collected. For each example, describe briefly (a) how the problem was identified, (b) what steps your agency took to make the improvement and (c) the measurable impacts of these changes. Examples may come from ClientTrack/HMIS as well as other data sources such as participant feedback and staff observations.

V. Partnerships, Resources And Collaboration (20 Pts)

17. Partnerships (4000 Characters)

Describe how your agency is part of the larger system of care. Give an example of how your agency is connected to other organizations that are or have supported your agency's program participants.

18. Collaboration (4000 Characters)

How will your agency work collaboratively to support program outcomes as needed in a seamless, person friendly way? Describe any key, formal partnerships that are jointly designed with other agencies and indicate whether they are formalized through a Memorandum of Understanding (MOU) or subcontract.

19. Resources (4000 Characters)

How will your organization continue to address this need (or solve this problem) if current funding ends?

VI. Budget (20 Pts)

20. FY 2021 Proposed Program Budget

- Complete proposed program budget using the template provided in the online application. Review the "sample" and "guidelines" tabs provided before completing the template. Ensure the requested fund justifications are complete.
- Ensure administration expenses are limited to 15%. The Budget Justification must be thoroughly completed. (Please describe in detail each of the line items requested in the budget. Employee positions should include brief descriptions of their duties in the program). If you are charging an indirect/administrative cost rate then you must remove any other line items related to indirect/administrative expenses. If an indirect cost rate is being requested, an approved cost plan from a cognizant agency must be included.
- Ensure FAA requested funding is not more than 25% of the Total Agency Budget

Click to download the REQUIRED FY 2021 Budget Worksheet Template. See [Attachment 8](#). Please upload once you have completely filled it out.

- Please submit budget in one of the following formats: **.xls** OR **.xlsx**; PDF is also acceptable but if changes must be made, this format will make it more difficult for you to make adjustments. Please name your budget as such: **(Agency Name or Initials)Budget_FY21.xls** OR **(Agency Name or Initials)Budget_FY21.xlsx**

21. Total Agency Budget

The Total Agency Budget must be attached to the proposal. The Budget forms that are part of the proposal do not need to be utilized for this budget as it can be in any form, but it should include all agency funding sources as well as expenditures by program.

- Please submit Total Agency Budget in one of the following formats: **.pdf** OR **.xls** OR **.xlsx**
- Please name your Total Agency Budget as such: *(Agency Name or Initials)TAB_FY21.pdf* OR *(Agency Name or Initials)TAB_FY21.xls* OR *(Agency Name or Initials)TAB_FY21.xlsx*

22. Audit Report

Submit most recent audit report. If there were findings, describe corrective actions.

- Please submit Audit Report in the following format: **.pdf**
- Please name your Audit Report as such: *(Agency Name or Initials)Audit_FY(Year of most recent audit).pdf*

23. Audit Report Corrective Actions Explanation (1000 Characters)

Please provide any Audit Report Corrective Actions Explanation, if applicable.

24. Year End Financials

Submit Year-End Financial Statements and IRS Form 990. If not submitted explain why.

- Please submit Year-End Financial Statements and IRS Form 990 in the following format: **.pdf**
- Please name your Year-End Financial Statements and IRS Form 990 as such: *(Agency Name or Initials)YEFS_FY20.pdf* AND *(Agency Name or Initials)IRS990_FY20.pdf*

25. Year End Financials Explanation (1000 Characters)

Please provide any Year End Financials explanation, if applicable.

26. Unit Cost

Submit proposed Unit Cost service description and unit cost of service rate. (Is this an industry standard? If so, please state source)

Ensure both the unit cost service description and cost rate are clear and accurately calculated. Formulas used to arrive at the cost rate should be included. (4000 characters)

27. FAA Funding

Is FAA funding being used as match for another funding source? If so please explain.

Choose Yes or No

28. FAA Funding Match Explanation (1000 characters)

Please provide any FAA Funding Explanation (only applicable if "YES" was selected for Question 27).

VII. Scope of Work

This section will be used to develop your contract agreement if your program is funded. These items will be monitored by contract monitors.

29. Target Population (200 Characters)

Briefly explain your target population.

30. Overview (400 characters or less)

Please provide a brief overview of the proposed program.

31. Services (1000 Characters)

List in bullet points the services you will be providing to clients.

SECTION V: APPLICATION REVIEW PROCESS

The application review process is welcoming to persons with disabilities, persons who have experienced homelessness, and persons with limited English proficiency. If you need any accommodations, please contact (561) 355-4718 or CSD-FAARFP@pbcgov.org.

- CSD shall recruit FAA Review Committee members.
- Review Committee members shall be trained, as appropriate, and receive submitted applications.
- Applications shall be reviewed, discussed and scored by the FAA Review Committee.
- Funding recommendations, based in part by the scoring, are submitted to the CAC/HHS for comments.
- Funding recommendations are posted to the FAA website
- Applicant(s) have seven (7) business days following the posting of funding recommendations to file a grievance notice.
- Contract agreements, based on the funding recommendations, are submitted to the BCC for final approval.

SECTION VI: GRIEVANCE NOTICE FORM

Grievance Notice Form Palm Beach County Community Services Department- FAA Program

Grievances may be filed by an entity submitting an NOFO (Proposer) that is aggrieved in connection with deviations from the established PROCESS for reviewing proposals and making recommended awards. The amount of recommended awards may not be grieved through this procedure.

If you wish to file a grievance with the Palm Beach County Community Services Department, Financially Assisted Agencies Program, this Grievance Notice Form must be completed, submitted, and received by the Director of the Community Services Department within seven (7) business days of posted funding recommendations. You will receive a written response within fifteen (15) business days of the receipt of this form by the Director of the Community Services Department. There is no administrative fee associated with filing this grievance.

When completed, submit this Grievance Notice Form via mail or email to:

Mr. James Green, Director Community Services Department
810 Datura Street, First Floor, West Palm Beach, Florida 33401
JGreen1@pbcgov.org

Entity Filing Grievance: _____

Which process was allegedly deviated from? _____

Describe in detail the alleged deviation; include how you were directly affected and what remedy you seek (add additional pages as needed):

What remedy does the applicant seek?

Authorized Agency Representative Name and Title

Agency Filing Grievance

Authorized Agency Representative Signature

Date

ATTACHMENT 1: REQUIRED COVER SHEET

REQUIRED COVER SHEET



**PALM BEACH COUNTY
DEPARTMENT OF COMMUNITY SERVICES
FINANCIALLY ASSISTED AGENCIES FY 2021**

PLEASE RESPOND TO ALL QUESTIONS LISTED BELOW:

(NOTE: This form is formatted using MS Word, Cambria, and 10pt font)

QUESTIONS:	AGENCY RESPONSES:
NAME OF AGENCY:	
SERVICE CATEGORY (identify the service category for which the proposal is being submitted):	
PROGRAM TITLE:	
PRIORITY POPULATION (include the unduplicated number to be served annually):	
GEOGRAPHIC AREA TO BE SERVED:	
COMMISSION DISTRICT(S) TO BE SERVED:	
PROGRAM STATUS (existing or new program):	
PROGRAM START DATE (if new program):	
TOTAL PROGRAM BUDGET:	\$
AMOUNT OF FUNDING REQUEST (how much you are requesting in the proposal):	\$
UNIT COST SERVICE DESCRIPTION:	
UNIT COST OF SERVICE:	
IDENTIFY IF AGENCY IS CURRENTLY CERTIFIED BY NONPROFITS FIRST: (Yes or No)	
OVERVIEW (3 sentence overview of the program – this must be short and concise and will be used to communicate the purpose of programs and services to the Board of County Commissioners and various publications):	

SPECIAL NOTICE:

Contracted agencies must comply with the current Health Insurance Portability and Accountability Act (HIPAA). If your agency does not provide services that fall under HIPAA Privacy Rules, please state that in the above overview.

ATTACHMENT 2: FY 2021 – 2022 FAA SOFI NOFO RANKING GUIDE FOR REVIEW PANELIST

Economic Stability/Poverty Category - Funding Priority #2

As stated in the FAA NOFO Guidance FY20 all scored proposals will be ranked. The Guidance states the following: The Review Panel will rank all proposals based on how critical they deem the program is for the system of care. The SCORE awarded to a proposal is reflective of how competitive the proposal is. The RANKING of the proposals is reflective of how imperative and critical the services are to ensure availability and access.

The following data and information should be considered when ranking the proposals. This is to serve as a guide to ensure the ranking decisions are data driven.

The proposal considered the most critical to the system of care will be ranked #1. All proposals shall be ranked.

No two proposals shall be ranked the same, as a tie. If there are 10 proposals, then the ranking should ultimately have 10 proposals ranked 1 through 10, with 1 being deemed the most critical.

Economic Stability/Poverty to Consider in Ranking

Funding priorities for the FY 2021 - 2022 NOFO are ranked in order of priority below:

1. Economic Mobility – Securing Our Future Initiative (SOFI)

Strategy #1 Build or create pathways for economic mobility for families with children ages 0-18 that increase wages and maintain the increase over time.

Proposals will be ranked the highest for those using strategy #1 and those who are:

1. Serving families earning below 100 percent of the Federal Poverty Level
2. Serving families who reside in high poverty neighborhoods (See [Attachment 3](#))
3. Serving families who are users of multiple systems (TANF, SNAPS, Housing Subsidies, Homeless, those at risk of homelessness and Medicaid)

ATTACHMENT 3: HIGH POVERTY NEIGHBORHOOD DETAILS

High Poverty Neighborhood Details

The following chart should be considered when determining areas to serve that are in high poverty neighborhoods:

Indicator: Families with children in Poverty (%)

Top 5 Zip codes:

#	Municipality	Zip Codes	Percentage of Families with children in Poverty
1	Pahokee/Canal Point	33476/33438	48.1%
2	West Palm Beach	33403	46%
3	Belle Glade/South Bay	33430/33493	36.1%
4	West Palm Beach	33407	35.2%
5 tie	Riviera Beach and Lake Worth	33404 and 33460	33.4%

Source:

<https://trustedpartner.azureedge.net/docs/library/ChildrensServicesCouncil2011/PBCZipCodeReportSept2017.pdf>

ATTACHMENT 4: ECONOMIC MOBILITY – SECURING OUR FUTURE (SOFI) - PROGRAM DESCRIPTION

The chart below outlines the flow through the SOFI system.

Step 1: Starting at the top are the two groups guiding the work: Birth to 22: United for Brighter Futures, and the Citizens Advisory Committee (CAC) on Health and Human Services. These groups currently serve as the two Systems of Care collaborating with SOFI.

Step 2: The next row of agencies shows the agency partners that will work to **Improve Access to Services**. Memorandums of Agreements to enhance access to services for the families enrolled in SOFI are being formalized. Organizations that provide critical emergency services are asked to prioritize participating families. Many of these organizations requested periodic community sessions to provide services directly to families.

Step 3: After awarded agencies complete the SOFI contracting process, they will assist each participating family to complete an Employ Florida Application. The Employ Florida application will enable clients participating in this poverty reduction initiative to be matched with businesses that are participating in this initiative. The applications are online and will be coded in the Employ Florida system to gather and analyze data can. The data will also enable the use of an asset-based approach to service delivery. Assistance with these applications will be available for clients either through CareerSource, CSD Community Action or the awarded agency's case managers.

Step 4: Awarded agencies will enter clients' demographic information in HMIS. An electronic self-sufficiency matrix will be completed with the client, which will be used to establish the baseline for the client's progress through the program. The agency serving the client will then use the matrix to build a service plan for the client and start working with the client to reach the goal of increasing their income. The agency will be encouraged to collaborate within the system to meet the client's needs.

Step 5: The Community Action Program will be responsible for reviewing the data for all families in HMIS/CMIS/Client track and providing periodic reports. As part of the initiative, agencies will encourage their clients to attend orientation and subsequent community sessions. During this orientation, the client will find out about the purpose of the program, connect with other clients in the program and find out about resources beyond the agency serving them. These sessions will be held regionally at least two (2) times per year.

After initially meeting altogether, the sessions will then split into two groups (which are the two boxes to the left and right of the orientation). To the right is the meeting for the group of clients to encourage their supporting one another and building natural support networks. During these sessions, staff (or hired consultant) will be listening to better understand barriers that the clients may be facing. The sessions will also focus on advocacy, resilience and other life skills. Staff (or consultant) will compile the information for the Poverty workgroup and Economic Access Team.

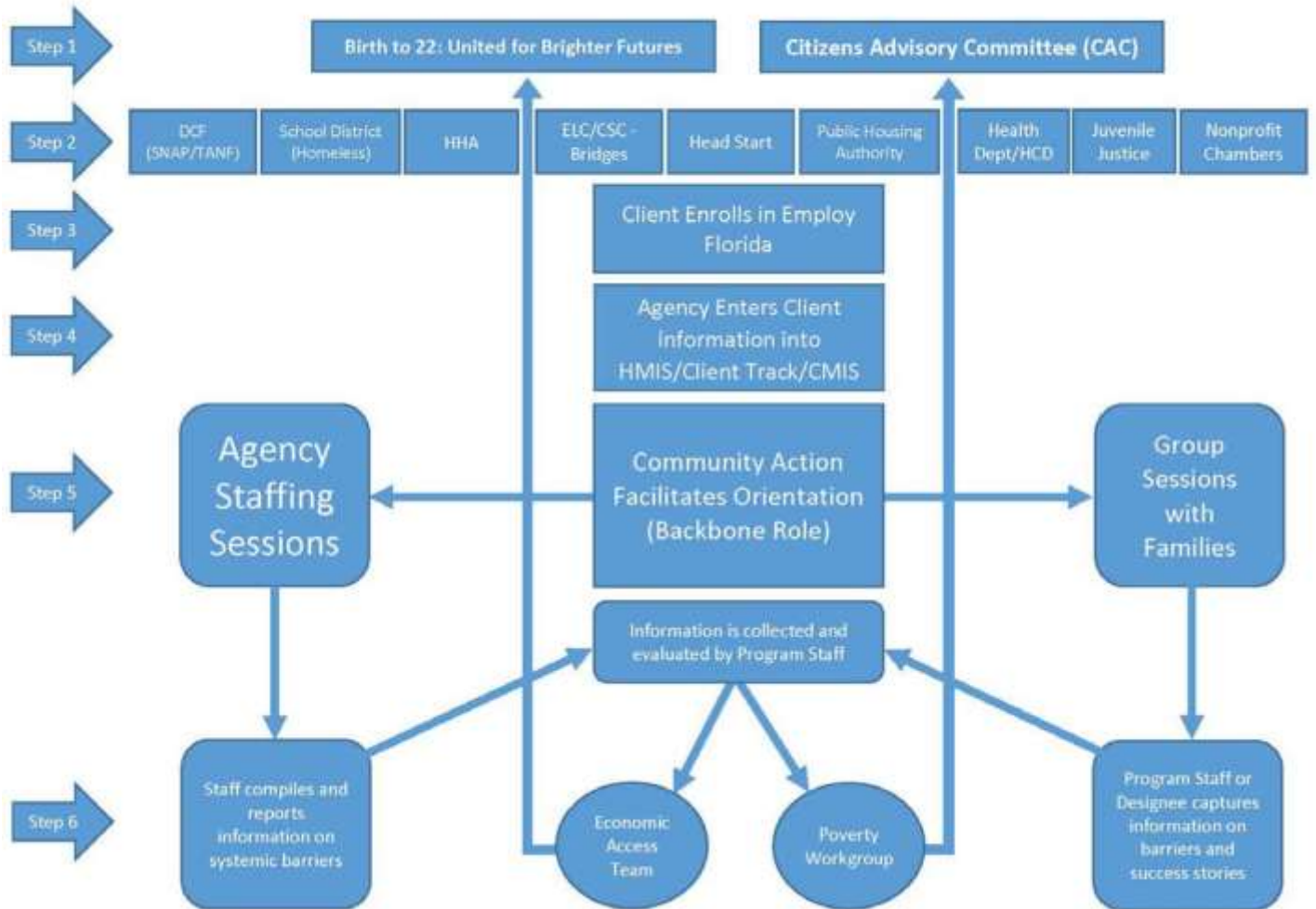
The agency staffing sessions will also take place after the groups split to discuss client barriers and staff cases where they may assist each other and problem solve. This information will also be brought to the Poverty workgroup and the Economic Access Team.

Step 6: Finally, once the Economic Access Team and Poverty Workgroup receive the feedback from the sessions, they will bring it back to their respective groups who will continue to work on further developing the

system of care- thus creating a full feedback loop to the entire process.

Program Evaluation Component-Data sharing will be necessary in order to conduct an independent evaluation of the Securing Our Future initiative (SOFI). Data will be made available to ThinkSpot organization for analysis. An analysis will be conducted on groups of families that increase their household income to determine which variable or combination of variables significantly contributed to the increase. Agreements with other organizations will be made to determine if the increase in household income correlates with improved educational, health and delinquency outcomes.

Flowchart Outlining the Economic Mobility Initiative



Community Services Department is currently working on coordination agreement with the following entities to streamline service provision:

Service	Agency
Child Care	Children’s Services Council
Child Care	Early Learning Coalition
Child Care	Head Start
Child Care (summer)	Youth Services Department
Employment & Employment Skills	Career Source PBC (contract with businesses and municipalities) and host job fairs
Employment	A & A and Temp Agencies
Employment & Employment Skills	Community Action Agency
Education (coordination)	School District
Food	United Way
Healthcare	Health Care District
Housing	Homeless and Housing Alliance
Housing	PBC Housing Authorities
Housing	Community Land Trust
Housing	Habitat for Humanity
Transportation	Palm Tran & Palm Tran Connection

ATTACHMENT 5: ECONOMIC MOBILITY – SOFI

Economic Mobility - Securing our Future Initiative (SOFI)

Trainings offered by CAP, Career Source and School District Adult Education Programs

CAP trainings:

- CDL
- Childcare
- Computer Skills
- Construction Trades: Welding, Plumbing, HVAC, Electrician
- D License
- Debt Reduction
- Entrepreneurship
- Financial Management
- Food Certification
- Food Prep
- Fork lift
- G License
- Home Health Aide
- Licensed Practical Nursing
- Patient Care Technician
- Retail
- Work Readiness

Career Source Trainings: <https://careersourceflorida.com/career-assistance/>

School District:

https://www.palmbeachschools.org/students_parents/adult_and_community_education/career_and_technical_education

ATTACHMENT 6: INTERNAL CONTROL QUESTIONNAIRE

INTERNAL CONTROL QUESTIONNAIRE (to be completed by applicant)

	YES	NO	N/A
GENERAL			
The following questions relate to the internal accounting controls of the overall organization.			
1. Are the duties for key employees of the organization defined?			
2. Is there an organization chart which sets forth the actual lines of responsibility?			
3. Are written procedures maintained covering the recording of transactions?			
a. Covering an accounting manual?			
b. Covering a chart of accounts?			
4. Do the procedures, chart of accounts, etc., provide for identifying receipts and expenditures of program funds separately for each grant?			
5. Does the accounting system provide for accumulating and recording expenditures by grant and cost category shown in the approved budget?			
6. Does the organization maintain a policy manual covering the following:			
a. approval authority for financial transactions?			
b. guidelines for controlling expenditures, such as purchasing requirements and travel authorizations?			
7. Are there procedures governing the maintenance of accounting records?			
a. Are subsidiary records for accounts payable, accounts receivable, etc., balanced with control accounts on a monthly basis?			
b. Are journal entries approved, explained and supported?			
c. Do accrual accounts provide adequate control over income and expense?			
d. Are accounting records and valuables secured in limited access areas?			
8. Are duties separated so that no one individual has complete authority over an entire financial transaction?			
9. Does the organization use an operating budget to control funds by activity?			

	YES	NO	N/A
10. Are there controls to prevent expenditure of funds in excess of approved, budgeted amounts? For example, are purchase requisitions reviewed against remaining amount in budget category?			
11. Has any aspect of the organization's activities been audited within the past 2 years by another governmental agency or independent public accountant?			
12. Has the organization obtained fidelity bond coverage for responsible officials?			
13. Has the organization obtained fidelity bond coverage in the amounts required by statutes or organization policy?			
14. Are grant financial reports prepared for required accounting periods within the time imposed by the grantors?			
15. Does the organization have an indirect cost allocation plan or a negotiated indirect cost rate?			

CASH RECEIPTS

1. Does the organization have subgrant agreements which provide for advance payments and/or reimbursement of cost?			
2. If advance payments have been made to the organization:			
a. Are funds maintained in a bank with sufficient federal deposit insurance?			
b. Is there an understanding of the terms of the advance (i.e. to be used before costs can be submitted for reimbursement)?			

PURCHASING, RECEIVING, AND ACCOUNTS PAYABLE

The following conditions are indicative of satisfactory control over purchasing, receiving, and accounts payable.

1. Prenumbered purchase orders are used for all items of cost and expense.
2. There are procedures to ensure procurement at competitive prices.
3. Receiving reports are used to control the receipt of merchandise.
4. There is effective review by a responsible official following prescribed procedures for program coding, pricing, and extending vendors' invoices.
5. Invoices are matched with purchase orders and receiving reports.
6. Costs are reviewed for charges to direct and indirect cost centers in accordance with applicable grant agreements and applicable Federal Management circulars pertaining to cost principles.
7. When accrual accounting is required, the organization has adequate controls such as checklists for statement closing procedures to ensure that open invoices and uninvoiced amounts for goods and services received are properly accrued or recorded in the books or controlled through worksheet entries.

	YES	NO	N/A
4. Are extensions on invoices and applicable freight charges checked by accounts payable personnel?			
5. Is the program to be charged entered on the invoice and checked against the purchase order and approved budget?			
6. Is there an auditor of disbursements who reviews each voucher to see that proper procedures have been followed?			
7. Are checks adequately cross referenced to vouchers?			
8. Are there individuals responsible for accounts payable other than those responsible for cash receipts?			
9. Are accrual accounts kept for items which are not invoiced or paid on a regular basis?			
10. Are unpaid vouchers totaled and compared with the general ledger on a monthly basis?			

CASH DISBURSEMENTS

The following conditions are indicative of satisfactory controls over cash disbursements.

1. Duties are adequately separated; different persons prepare checks, sign checks, reconcile bank accounts, and have access to cash receipts.
2. All disbursements are properly supported by evidence of receipt and approval of the related goods and services.
3. Blank checks are not signed.
4. Unissued checks are kept in a secure area.
5. Bank accounts are reconciled monthly.
6. Bank accounts and check signers are authorized by the board of directors or trustees.
7. Petty cash vouchers are required for each fund disbursement.
8. The petty cash fund is kept on an imprest basis.

	YES	NO	N/A
1. Are checks controlled and accounted for with safeguards over unused, returned, and voided checks?			
2. Is the drawing of checks to cash or bearer prohibited?			
3. Do supporting documents, such as invoices, purchase orders, and receiving reports, accompany checks for the check signers' review?			
4. Are vouchers and supporting documents appropriately cancelled (stamped or perforated) to prevent duplicate payments?			

	YES	NO	N/A
5. If check signing plates are used, are they adequately controlled (i.e., maintained by a responsible official who reviews and accounts for prepared checks)?			
6. Are two signatures required on all checks or on checks over stated amounts?			
7. Are check signers responsible officials or employees of the organization?			
8. Is the person who prepares the check or initiates the voucher other than the person who mails the check?			
9. Are bank accounts reconciled monthly and are differences resolved?			
10. Concerning petty cash disbursements:			
a. Is petty cash reimbursed by check and are disbursements reviewed at that time?			
b. Is there a maximum amount, reasonable in the circumstances, for payments made in cash?			
c. Are petty cash vouchers written in ink to prevent alteration?			
d. Are petty cash vouchers canceled upon reimbursement of the fund to prevent their reuse?			

PAYROLL

The following conditions are indicative of satisfactory controls of payroll.

1. Written authorizations are on file for all employees covering rates of pay, withholdings and deductions.
2. The organization has written personnel policies covering job descriptions, hiring procedures, promotions, and dismissals.
3. Distribution of payroll charges is based on documentation prepared outside the payroll department.
4. Payroll charges are reviewed against program budgets and deviations are reported to management for follow-up action.
5. Adequate timekeeping procedures, including the use of timeclock or attendance sheets and supervisory review and approval, are employed for controlling paid time.
6. Payroll checks are prepared and distributed by individuals independent of each other.
7. Other key payroll and personnel duties such as timekeeping, salary authorization and personnel administration are adequately separated.

- | | YES | NO | N/A |
|---|-----|----|-----|
| 8. Are payroll and personnel policies governing compensation in accordance with the requirements of grant agreements? | | | |
| 9. Are there procedures to ensure that employees are paid in accordance with approved wage and salary rates? | | | |
| 10. Is the distribution of payroll charges checked by a second person and are aggregate amounts compared to the approved budget? | | | |
| 11. Are wages paid at or above the Federal minimum wage? | | | |
| 12. Are procedures adequate for controlling: (a) overtime wages, (b) overtime work authorization, and (c) supervisory approval of overtime? | | | |
| 13. Are payroll checks distributed by persons not responsible for preparing the checks? | | | |

PROPERTY AND EQUIPMENT

The following conditions are indicative of satisfactory control over property and equipment.

1. There is an effective system of authorization and approval of capital equipment expenditures.
2. Accounting practices for recording capital assets are reduced to writing.
3. Detailed records of individual capital assets are kept and periodically balanced with the general ledger accounts.
4. There are effective procedures for authorizing and accounting for disposals.
5. Property and equipment is stored in a secure place.

- | | YES | NO | N/A. |
|--|-----|----|------|
| 6. Are executive authorizations and approvals required for originating expenditures for capital items? | | | |
| 7. Are expenditures for capital items reviewed for board approval before funds are committed? | | | |

ATTACHMENT 7: ROMA LOGIC MODEL

ROMA Logic Model – Family Level Example
National ROMA Peer-To-Peer Training Program

Identified Problem, Need or Situation	Service or Activity	Outcome	Projected Indicator	Actual Indicator	Measurement Tool	Data Procedures	Frequency
		<i>General statement of results expected</i>	<i># to achieve/# to be served; %; time frame</i>	<i># achieved/# served; %; time frame</i>	Output Tool: Outcome Tool:	Who does it? What is the process? Where is data stored?	<i>Data Collection and Reporting</i>
Mission:							

Calculating Agency's Targeting Success Rate:
 Actual number achieving outcome/Projected number to achieve outcome=

Logic Model Checklist

- ❑ Was the mission of the organization or program identified? (foundation)
- ❑ Was a Family, Agency, or Community box checked? (*Note: in Introduction this will be a Family Level Logic Model. Community and Agency will come in RNG*)
- ❑ Is the need statement clear? (not a “need for a service” but the identification of what is needed or lacking) (Column 1)
- ❑ Does the service or activity match the need? (Columns 1-2)
- ❑ Does the service include the number to be served and the timeframe?
Is the timeframe realistic? (Column 2)
- ❑ Does the outcome (column 3) match the need (column 1)? Can the outcome be produced by the identified service? (column 2) Ensure the outcomes are the required outcomes listed in the guidance (column 3)?
- ❑ Is the outcome realistic, clear, and attainable? (Column 3) (*does the outcome avoid words like “received” as this makes the statement appear to relate only to the receipt of a service and not an outcome – rather say what has changed*)
- ❑ Does the projected outcome indicator provide a way to measure the outcome? Are the indicators realistic, clear, and attainable? (column 4)
- ❑ Does the **projected indicator** include number to achieve the outcome, number to be served, the percent that represents the relationship between these two numbers and a timeframe? (column 4)
- ❑ If this is a logic model created after services have been delivered, identify the **actual indicator**, including actual numbers who achieved, actual number who were served, the percent that represents the relationship between the actual numbers, and the time frame (column 5)
 - ❑ *Analysis guidance: Are the actual results consistent with the projected numbers? What is the agency’s ability to target its performance? Note: this is the percent that represents the relationship between the number who actually achieved and the number projected to achieve.*
- ❑ Was a specific measurement tool(s) identified? Were both output and outcome measurement tools identified? (Column 6)
- ❑ Are the data collection procedures and personnel specific? (Column 7)
- ❑ Is the frequency of data collection sufficient to support monitoring progress and outcomes? Are the intervals of reporting clearly identified? (Column 8)

ATTACHMENT 8: BUDGET WORKSHEET

FY 2021 PROGRAM BUDGET WORKSHEET

FAA Budget Items	FAA Program Name	Palm Beach County FAA	FAA Program Funder #2	FAA Program Funder #3	FAA Program Funder #4	Total Program Funding (All Sources)
Program Period: FY 2021		Proposed	Confirmed	Pending	Pending	Pending
TOTAL PROGRAM FUNDING AMOUNT =						
Program Expenses						
Program Expenses	Narrative	Total	Total	Total	Total	Total
Personnel						
Program Manager						
Program Assistant						
Fringe Benefits - Program Assistant						
Community Educator						
Building /Occupancy						
Rent/Lease						
Building Maintenance						
Insurance						
Utilities						
Electric						
Water						
Telephone						
Project Supplies/Equipment						
Office Supplies						
Postage/Shipping						
Printing						
Materials/Program Supplies						
Equipment Rental						
Professional Fees						
Conference Registration Fees						
Training						
Travel/Mileage						
TOTAL PROGRAM EXPENSES =		\$ -				
Administrative Expenses						
Administrative Expenses	Narrative					
Personnel						
Executive Position #1 (JL)						
Consulting Fees						
XYZ Consultants						
TOTAL ADMINISTRATIVE EXPENSES =						
Administrative % of PBC Award			#DIV/0!			

ATTACHMENT 9: INSURANCE

Prior to execution of the agreement by the COUNTY, the AGENCY must obtain all insurance required under this article and have such insurance approved by the COUNTY's Risk Management Department.

- A. AGENCY shall, at its sole expense, agree to maintain in full force and effect at all times during the life of the agreement, insurance coverages and limits (including endorsements), as described herein. AGENCY shall agree to provide the COUNTY with at least ten (10) day prior notice of any cancellation, non-renewal or material change to the insurance coverages. The requirements contained herein, as well as COUNTY's review or acceptance of insurance maintained by AGENCY are not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by AGENCY under the Agreement.
- B. **Commercial General Liability** AGENCY shall maintain Commercial General Liability at a limit of liability not less than **\$500,000** Each Occurrence. Coverage shall not contain any endorsement excluding Contractual Liability or Cross Liability unless granted in writing by COUNTY's Risk Management Department. AGENCY shall provide this coverage on a primary basis.
- B. **Business Automobile Liability** AGENCY shall maintain Business Automobile Liability at a limit of liability not less than **\$500,000** Each Accident for all owned, non-owned and hired automobiles. In the event AGENCY does not own any automobiles, the Business Auto Liability requirement shall be amended allowing AGENCY to agree to maintain only Hired & Non-Owned Auto Liability. This amended requirement may be satisfied by way of endorsement to the Commercial General Liability, or separate Business Auto coverage form. AGENCY shall provide this coverage on a primary basis.
- C. **Worker's Compensation Insurance & Employers Liability** AGENCY shall maintain Worker's Compensation & Employers Liability in accordance with Florida Statute Chapter 440. AGENCY shall provide this coverage on a primary basis.
- D. **Professional Liability** AGENCY shall maintain Professional Liability or equivalent Errors & Omissions Liability at a limit of liability not less than **\$1,000,000** Each Claim. When a self-insured retention (SIR) or deductible exceeds **\$10,000**, COUNTY reserves the right, but not the obligation, to review and request a copy of AGENCY's most recent annual report or audited financial statement. For policies written on a "Claims-Made" basis, AGENCY shall maintain a Retroactive Date prior to or equal to the effective date of the agreement. The Certificate of Insurance providing evidence of the purchase of this coverage shall clearly indicate whether coverage is provided on an "occurrence" or "claims - made" form. If coverage is provided on a "claims - made" form the Certificate of Insurance must also clearly indicate the "retroactive date" of coverage. In the event the policy is canceled, non-renewed, switched to an Occurrence Form, retroactive date advanced, or any other event triggering the right to purchase a Supplement Extended Reporting Period (SERP) during the life of the agreement, AGENCY shall purchase a SERP with a minimum reporting period not less than 3 years. AGENCY shall provide this coverage on a primary basis.
- Additional Insured** AGENCY shall endorse the COUNTY as an Additional Insured with a CG 2026 Additional Insured - Designated Person or Organization endorsement, or its equivalent, to the Commercial General Liability. The Additional Insured endorsement shall read "Palm Beach County Board of County Commissioners, a Political Subdivision of the State of Florida, its Officers, Employees and Agents." AGENCY shall provide the Additional Insured endorsements coverage on a primary basis.

- E. **Waiver of Subrogation** AGENCY hereby waives any and all rights of Subrogation against the COUNTY, its officers, employees and agents for each required policy. When required by the insurer, or should a policy condition not permit an insured to enter into a pre-loss contract to waive subrogation without an endorsement to the policy, then AGENCY shall agree to notify the insurer and request the policy be endorsed with a Waiver of Transfer of rights of Recovery Against Others, or its equivalent. This Waiver of Subrogation requirement shall not apply to any policy, which specifically prohibits such an endorsement, or which voids coverage should AGENCY enter into such a contract on a pre-loss basis.
- F. **Certificate(s) of Insurance** No later than the execution of the agreement, AGENCY shall deliver to the COUNTY's representative as identified in Article 24, a Certificate(s) of Insurance evidencing that all types and amounts of insurance coverages required by the agreement have been obtained and are in full force and effect. Such Certificate(s) of Insurance shall include a minimum thirty (30) day endeavor to notify due to cancellation or non-renewal of coverage. The certificate of insurance shall be issued to
- Palm Beach County Board of Commissioners
c/o Community Services Department
810 West Datura Street
West Palm Beach, FL 33401
ATTN: Office of Behavioral Health and Substance Use Disorders
- G. **Umbrella or Excess Liability** If necessary, AGENCY may satisfy the minimum limits required above for Commercial General Liability, Business Auto Liability, and Employer's Liability coverage under Umbrella or Excess Liability. The Umbrella or Excess Liability shall have an Aggregate limit not less than the highest "Each Occurrence" limit for either Commercial General Liability, Business Auto Liability, or Employer's Liability. The COUNTY shall be specifically endorsed as an "**Additional Insured**" on the Umbrella or Excess Liability, unless the Certificate of Insurance notes the Umbrella or Excess Liability provides coverage on a "Follow-Form" basis.
- H. **Right to Review** COUNTY, by and through its Risk Management Department, in cooperation with the contracting/monitoring department, reserves the right to review, modify, reject or accept any required policies of insurance, including limits, coverages, or endorsements, herein from time to time throughout the term of the agreement. COUNTY reserves the right, but not the obligation, to review and reject any insurer providing coverage because of its poor financial condition or failure to operate legally.