




**Financially Assisted
Agencies FY 2017
Request for Proposals
Bidder's Conference**

April 11, 2016

Palm Beach County

Department Of Community Services



AGENDA
Financially Assisted Agency (FAA) Request for Proposals (RFP)
Bidder's Conference
April 11, 2016
1:00 p.m.

Sign In & Distribution of RFP Invitation Code

Welcome & Introductions

Channell Wilkins
Director

Taruna Malhotra
Assistant Director

Overview of 2017 FAA RFP Process and Guidance

Sonja Holbrook
Manager of Planning and Evaluation

Fiscal Overview for RFP Budgets

Thomas Eaton
Fiscal Manager

FAA Application Website Overview

Stessy Cocerez
Planning Technician

Questions & Answers



Welcome & Introductions

Channell Wilkins

Director

Taruna Malhotra

Assistant Director





Community Services Department FAA Objectives and Performance Measures

FAA Goal

To follow the Health and Human Services Element of the *Comprehensive Plan of Palm Beach County* goals and objectives and the recommendations of the Citizens Advisory Committee that address the availability of health and human services necessary to protect the health, safety and welfare of its residents, by providing funding to qualifying non-profit organizations to provide health and human services related to the approved service categories.

FAA Objectives

- Provide monitoring, evaluation and technical assistance to contracted providers to improve program effectiveness and performance.
- Enhance quality management activities to measure the quality of services and program effectiveness utilizing the newly implemented network of client databases.

FAA Performance Measures for Economic Stability/Poverty and Senior Services
Economic Stability/Poverty program participants will increase self-sufficiency.

Senior Services program participants will remain in highest quality living condition that meets their basic needs.

Community Services Department FAA Program

There will be additional details throughout today's presentation regarding the proposal components. There are a few that I would like to highlight. It will be critical in this year's proposals to:

Avoid Duplication To emphasize proposed services are not a duplication of what other agencies provide. It is encouraged that the FAA funding only be used when there are no other existing resources.

Eligibility Criteria Eligibility criteria and screening will be particularly important for the Economic Stability/Poverty category including the income levels of the clients to be served, support for why the determined income level was selected, the method in which the income level will be calculated, the policies and procedures to ensure all program staff assess income level using the same method.

Collaboration Strong community collaboration and service linkage will be important in the success of your proposal. Describing how your program will leverage community resources and link clients to the broad array of health and human services within Palm Beach County will be important.

Data Driven Decision-Making We continue to strengthen our capacity to make more informed, data driven decisions. Using data to support your proposal and citing the sources of the data will be critical.



Overview of 2017 FAA RFP Process and Guidance

Sonja Holbrook

Manager of Planning and Evaluation



FAA Funding Cycle

FY 2017 RFP Categories:

Economic Stability/Poverty

Seniors

Contract Extension through FY 2018 Categories:

Behavioral Health Services

Special Needs/Developmental Disabilities

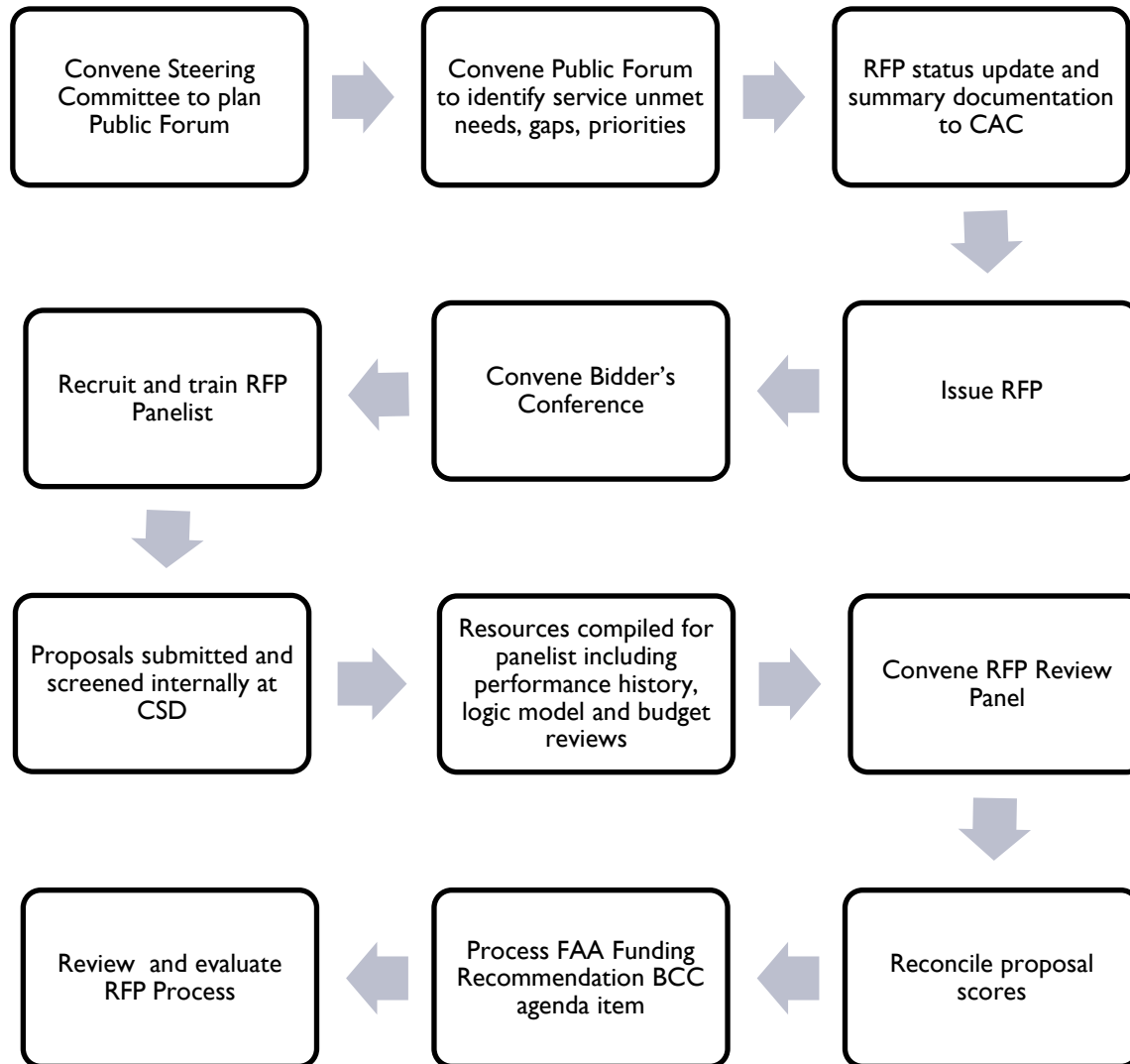
Contract Extension through FY 2019 Categories:

Homelessness

Domestic Abuse/Sheltering

The New and/or Continuing Initiatives and Innovative Programs will no longer be funded, per BCC approval April 1, 2014.

FAA RFP Process





FINANCIALLY ASSISTED AGENCIES FY 2017 REQUEST FOR PROPOSAL TIMELINE

| | |
|----------------------------------|---------------------------------------|
| April 3 | RFP advertised |
| April 4 | RFP available for public |
| April 11 | Mandatory Bidder's Conference |
| May (1st week) | Reviewer Training |
| May 12 | Final day to submit written questions |

May 13 Noon RFP Submission Deadline

| | |
|-----------------------|--|
| May 24-25 | <u>Economic Stability/Poverty</u> & <u>Seniors Services</u> Review Panels meet to finalize reviews and proposal scoring. |
| May 31-June 3: | Staff reconciles committee rankings, funding availability and develops recommended allocations |
| June 10: | County Administration reviews FAA recommendations |
| July: | Presentation of FY 2017 FAA recommendations to BCC |

CONE OF SILENCE

This RFP includes a Cone of Silence. The Cone of Silence will apply from the date the RFP is due, which is May 13, 2016, until the final FAA allocations are approved by the Board of County Commissioners.

Respondents are advised that the "Palm Beach County Lobbyist Registration Ordinance" (Ordinance), a copy of which can be accessed at: http://www.pbcgov.com/legislativeaffairs/pdf/Lobbyist_Registration_Ordinance.pdf is in effect. 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 RFP 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, rejects all proposals or otherwise takes action which ends the solicitation process.

Ethics Commission

If anyone has a question regarding ethics they should not be addressed to our department, but should be addressed directly with the Ethics Commission.

<http://www.palmbeachcountyethics.com/>

Non Profits First Certification and Exemption Process

County recognizes the certification process for nonprofit agencies through Nonprofits First: www.nonprofitsfirst.com.

Currently certified and exempted agencies will receive 3 additional points in the proposal evaluation process.

Non-Profits First Certification may be exempt for agencies that provide documentation of certification from another funding or oversight body recognized by their industry or if their agency has received two (2) consecutive monitoring reports from FAA with no findings. Exemptions must be requested and approved by the Department of Community Services each contract year.

Requests for exemption must be indicated in the proposal Cover Page- Non Profits First section with supporting documentation uploaded into the Additional Information field within Request Information.

All non-exempted agencies contracting with the County will be required to maintain certification or be certified within 18 months of their initial contract date.

Proposal Highlights

All applicants attending the mandatory bidder's conference will be approved to submit a full proposal. The full proposal is due no later than

May 13, 2016 at 12:00 p.m. NOON.

Proposals should:

- Address all components of the Community Services FAA RFP Submission website <http://www.cybergrants.com/pbc/proposal> including the Addendum section.
- Be written in plain language; a narrative that fully addresses all questions in the FAA RFP Guidelines.
- Be understandable to people unfamiliar with your organization or your area of expertise.
- Specifically address the funding priorities set out in this Request for Proposal.

Proposal Components

Cover Page: Ensure all fields are filled out completely.

Need: Include data and cite sources. For Economic Stability/Poverty ONLY: Clearly define the poverty level of the clients to be served, including method and tools used to calculate the income level.

Approach and Design: Ensure Scope of Work and Project Innovation and Anticipated Challenges sections are completed.

Evaluation Approach: Ensure Logic Model and Evaluation Measurement Tool sample are uploaded. A Logic Model template is provided along with instructions and definition sheet. Discuss prior outcome/data in the appropriate Addendum section.

Available Resources and Sustainability: Ensure if there are partners that this is indicated, partners are listed and MOAs/MOUs are uploaded. Strong demonstration of collaborative efforts and linkage to services is encouraged. Ensure Organization Capacity section is completed. Discuss volunteer support and opportunities to leverage funds in the appropriate Addendum sections.

Budget: New program budget template provided. Unit cost service description and Unit cost of service submitted in the provided Addendum sections.

Proposal Components

Additional Scoring Components:

Underserved Populations- Ensure data is clearly stated and cited demonstrating a 10% deviation from target population and the overall population. Submit in the provided Addendum section.

Underserved Areas- Ensure data is clearly stated and cited using zip code and/or census track. Also indicate existing providers, if any, located in the service area. Submit in the provided Addendum section.

Performance History- No response needed. This information is supplied to reviewers by internal Department of Community Services staff members. If you have additional data to be considered it may be submitted in the Additional Information field.

Nonprofits First Certification/Exemption- Should be responded to on the Cover Page and any supporting documents uploaded in the Request Information, Additional Information field.

Evaluation

- Clearly describe evaluation methods and activities of the program being proposed.
- Outcome Resources & Tips
 - Evaluation Plan/Logic Model Instructions Review
 - Definitions of Terms Review
 - SMART (specific, measurable, achievable, realistic, time bound) outcomes
 - Reflective of outcomes stated in the FAA RFP Guidance
 - Outcome applies to all program participants
 - Outcome should clearly measure the activities
 - Measurement tool should clearly measure outcome
 - Use of indicators that have current state or national data documentation available is highly recommended.
- Describe how evaluation processes are incorporated into agency policy and procedures.
- Describe how outcomes are tracked electronically.
- Provide evaluation measurement tool sample.
- Discuss prior outcomes/data that demonstrate success of the services in this proposal, including FAA evaluations as well as other funders' reports.

Economic Stability/Poverty Recommendations

Resource Documents

Palm Beach County Health & Human Services Element

Report of Health & Human Services in Palm Beach County – Based on Key Community Indicators

Palm Beach County Hunger Relief Plan

Asset Limited Income Constrained Employed (ALICE) Report

State of Florida - Palm Beach County demographic & profile data

Palm Beach County Community Action Program – Community Service Block Grant (CSBG) Goals

Data Highlights

The ALICE report estimates that 42% (217,711 of 522,201) of households in Palm Beach County are living below the ALICE Threshold/Budget which is based on local average costs for basic living expenses (housing, food, healthcare, child care and transportation). Racial disparities were highlighted with 63% of Black households below the ALICE Threshold 59% Hispanic, 38% White and 34% Asian. Half (50%) 50% of all jobs in Palm Beach County pay less than \$15.03 an hour (\$31,262 annually for full-time/2080 hrs).

Economic Stability/Poverty Recommendations

Data Highlights

DCF data estimated 472,717 (35%) of Palm Beach County residents living at or below 200% of the poverty level.

Areas most heavily impacted, in terms of the percentage of the total population receiving SNAP, are Pahokee (45%), West Palm Beach (Mangonia Park) (42%), Riviera Beach (41%), Belle Glade (38%), and Lake Worth (32%). As of January 1, 2016 an estimated 18,000 Palm Beach County residents lost their SNAP benefits.

Public Forum Identified Needs/Priorities

Self sufficiency and higher living wages

Education and job opportunities, as well as addressing barriers in accessing these services

Support services, of which housing and behavioral health were often noted

Linkage to services and benefits, including assistance in navigating systems and applications processes

Economic Stability/Poverty Recommendations

Outcomes

Programs and services in this category address outcomes and performance measures that work to increase the economic stability and self sufficiency of households.

Funding Priorities

Self Sufficiency Programs increasing earned income and reducing dependency
Short Term Financial Assistance, including for emergency, housing, utility expenses
Educational Opportunities including job training and job readiness

Preference will be given to services that demonstrate

A financial education component;

Strong community collaboration and service linkage particularly for affordable housing, childcare, legal services, benefits access, mental health and substance abuse services.

Proposals must demonstrate how assurances will be made to avoid duplication of existing services. It is encouraged that the FAA funding only be used when there are no other existing resources.

Proposals must clearly define the income level of clients to be served, including the method of calculation.

FY 2016 Allocation \$286,166

Senior Services Recommendations

Resource Documents

Palm Beach County Health & Human Services Element

Report of Health & Human Services in Palm Beach County – Based on Key Community Indicators

Palm Beach County Hunger Relief Plan

Asset Limited Income Constrained Employed (ALICE) Report

State of Florida Department of Elder Affairs - Palm Beach County demographic & profile data;

Palm Beach County Senior Wait List information

Your Aging and Disability Resource Center/Area Agency on Aging (AAA) Area 9 Plan

Data Highlights

Approximately 394,448 Palm Beach County residents who are 60 years of age or older, accounting for 29% of the total population. Among this population, 49,908 (12.7%) are below 125% of the poverty guideline.

The wait list for senior services has almost doubled in the past 3 years (2,790 to 4,165 unduplicated clients, 49.3%). Highest number of people on the waitlist home services (10,485) and short term case management (1,768).

Top problem/need identified among 211 callers 60 years of age or older is Mental Health (10%). This is followed by Financial Assistance (8%), Food (7%), Housing (7%), and Legal Assistance (6%) (FY14-15).

Hunger Relief Plan estimates that more than 28% of residents who are 60 or older may not have the resources to consistently access healthy food. Yet there is only a 52% food stamp participation rate among Palm Beach County resident 60 or older.

Senior Services Recommendations

Public Forum Identified Needs/Priorities

The information gathered from both the public forum dialogue and surveys support the AAA Area 9 identified needs for in home services, case management, and support services access and navigation.

Outcomes

Programs and services in this category address outcomes and performance measures that work to ensure seniors remain in the community and avoid becoming institutionalized in a nursing home setting.

Funding Priorities

In-Home Services


Caregiver Counseling & Training Services

Short Term Case Management

Programs to Reduce Isolation and Increase Socialization

Preference will be given to services that demonstrate strong community collaboration and service linkage particularly for affordable housing and legal services, benefits access and navigation, mental health and substance abuse services.

FY 2016 Allocation:\$658,312

The seal of Palm Beach County, Florida, is a circular emblem. It features a central palm tree with a yellow sun behind it, set against a light blue background. The words "PALM BEACH COUNTY" are written in a semi-circle at the top, and "FLORIDA" is written at the bottom. Two small black dots separate the top and bottom text. The seal is rendered in a light, semi-transparent grey color.

**Fiscal Overview for RFP
Budgets**
Thomas Eaton
Fiscal Manager



**Department of Community Services
Financially Assisted Agencies (FAA)
RFP Financial Review**

New Budget Template

| | A | B | C |
|----|--------------------------------|---|-----------------------|
| 1 | FAA Budget Items | FAA Program Name | Palm Beach County FAA |
| 2 | Program Period: FY 2017 | | Proposed |
| 3 | TOTAL PROGRAM FUNDING AMOUNT = | | \$ 112,045.00 |
| 4 | | | |
| 5 | Program Expenses | Narrative | Amount |
| 6 | Personnel | | \$ 72,445.00 |
| 7 | Program Manager | Program manager position for community support service. Salary expense is 100% funded by PBC FAA award and includes fringe benefits. | \$ 25,000.00 |
| 8 | Program Assistant | Program Assistant role is to support the program manager and community educator with daily tasks. This salary expense is 50% funded by PBC FAA award. Total salary expense is \$15,000 , with 50% allocated to PBC (\$7,500). (Salary expense does not include fringe benefits) | \$ 7,500.00 |
| 12 | Building /Occupancy | | \$ 27,050.00 |
| 13 | Programmatic Rent/Lease | *Note: Rent for areas that house admin staff should be listed seperately under admin seciton* Rent expense for Lake Worth facility. Total rental expense for FY16 = \$35,000. Allocation to Palm Beach County FAA award= \$20,000. Remaining \$15,000 will be paid by other operating income. | \$ 20,000.00 |
| 17 | Utilities | | \$ 2,400.00 |
| 18 | Electric | Electric Utility Services expense for location X | \$ 1,200.00 |
| 19 | Water | Water Utility service for location X | \$ 850.00 |
| 20 | Telephone | Telephone expense for landline at location X | \$ 350.00 |

- Simplified and easier to use
- No macros
- To be completed with all FY17 submissions
- Includes clearly defined sections for programmatic and admin expenses
- Will allow for better transparency and understanding of each program

New Budget Template

| | | |
|--|--|----------------------|
| TOTAL PROGRAM EXPENSES = | | \$ 104,845.00 |
| <u>Administrative Expenses</u> | <u>Narrative</u> | |
| Personnel | | \$ 4,250.00 |
| Executive Position #1 (JL) | A 5% allocation of the Executive Director salary expense (including fringe benefits) will be billed to Palm Beach County FAA. Executive Director total salary expense = \$85,000. 5% allocation to Palm beach County FAA = % \$4,250 | \$ 4,250.00 |
| Consulting Fees | | \$ 2,950.00 |
| XYZ Consultants | Accounting and audit expenses for FAA program. Annual Accounting fee = \$950, Annual Audit fee = \$2,000. Total expense = \$2,950 | \$ 2,950.00 |
| TOTAL ADMINISTRATIVE EXPENSES = | | \$ 7,200.00 |
| Administrative % of PBC Award | | 6% |

- Sheet will tally your program and admin expenses and show what your budgeted % is at
- Will allow us to review and discuss with you any items that may be questionable before approving contracts
- Narratives should be completed for each item with details about the cost to clarify

Administrative Costs

- Must be approved in your submitted budget
- Must be tracked separately in your General Ledger
- 15% cap on admin costs
- Cost allocation plan or activity logs needed for split funded/dual responsibility staff members
- If submitting an indirect cost rate for admin costs, you must also include the approved cost plan from a cognizant agency

Development of Unit Rates

- Agency should determine all costs that will be incurred to run the program (including administrative costs) and how much of those will be charged to the FAA program.
- Agency should review historical outputs (if available) to determine the total amount of units they expect to produce.
- The total dollar amount of the program divided by the number of units expected should be your proposed unit rate.

Backup Documentation

- General ledgers should be kept for each program, split by admin and program costs
- Costs in the general ledger should align to the costs in the submitted budget and any changes to the budget should be submitted to the County for review before they are incurred.
- General ledgers should not include excess costs above the revenue being earned for the program year. If it is not being paid for with FAA funds it should not be in the general ledger.
- Submitted units must have backup documentation readily available for review upon request or at time of annual monitoring. Units being submitted should be for services and employees that are paid for by the FAA funding when at all possible.

SAMIS



- User Access
- Allocations
- Budgets
- Reimbursements

Log-on To Samis Services

Please enter your User Id, Password and select your CSC.

Login id:
Password:
CSC:

Login not found.
 Please contact your System Administrator.

[For assistance with Internet Explorer 10, please click this link](#)
 Samis Announcements
 General announcements will be posted here.

SAMIS Users that have downloaded Internet Explorer 10 will need to use "Compatibility View" in order to have SAMIS function correctly. Compatibility view is located in the Tools menu. Please contact your local Samis help desk for

SAMIS is designed to be used with Internet Explorer. Please contact your help desk if you have questions.

SAMIS Administrator:
Pedro Medina
561-355-4651
pmedina@pbcgov.org



Reimbursement



[Log Out](#)
[Announcements](#)

[Status](#)
[Submitted](#)
[Run Reimbursement Detail Report](#)

Salary Accounts

| Category | Original Budget | Amended Budget | Pending | Current Request | YTD Request | Balance |
|----------------------------|-----------------|----------------|---------|-----------------|-------------|-------------|
| Regular Salaries and Wages | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |
| FICA | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |
| Retirement Contributions | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |
| Life and Health Insurance | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |
| Workers Compensation | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |
| Unemployment Compensation | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |
| Salary Totals: | 0.00 | 0.00 | | 0.00 | 0.00 | 0.00 |

Expense Accounts

| Category | Original Budget | Amended Budget | Pending | Current Request | YTD Request | Balance |
|-----------------------------------|-----------------|-----------------|---------|-----------------|-----------------|-----------------|
| Grants and Aids | | | | | | |
| Unit Cost - Direct Services | 7,670.00 | 7,670.00 | | 522.50 | 4,019.04 | 3,650.96 |
| Category Totals: | 7,670.00 | 7,670.00 | | 522.50 | 4,019.04 | 3,650.96 |
| Expense Totals: | 7,670.00 | 7,670.00 | | 522.50 | 4,019.04 | 3,650.96 |
| Salary and Expense Totals: | 7,670.00 | 7,670.00 | | 522.50 | 4,019.04 | 3,650.96 |

Net Amounts (Includes only the current reimbursement)

| | |
|--------------------|--------|
| Net Adjustments: | 0.00 |
| Net Reimbursement: | 522.50 |

The seal of Palm Beach County, Florida, is a large, light-colored watermark in the background. It features a central palm tree with a yellow sun behind it, set against a blue sky and a light blue sea. The words "PALM BEACH COUNTY" are arched across the top, and "FLORIDA" is arched across the bottom. Two small grey dots are positioned on the left and right sides of the seal.

FAA Application Website Overview

Stessy Cocerez
Planning Technician

Information

All questions must be emailed to:

Channell Wilkins at cwilkins@pbcgov.org

All questions and answers will be posted on the FAA website:

<http://www.pbcgov.com/communityservices/programs/financiallyassisted/>

All proposals must be submitted electronically to

<http://www.cybergrants.com/pbc/proposal> by

**Friday, May 13, 2016 before
12:00 NOON**

The seal of Palm Beach County, Florida, is a circular emblem. It features a central palm tree with a yellow sun rising behind it. The tree and sun are set against a light blue background representing water. The words "PALM BEACH COUNTY" are written in a semi-circle at the top, and "FLORIDA" is written at the bottom. Two small black dots separate the top and bottom text on the left and right sides.

Questions & Answers

A large, light blue watermark of the Palm Beach County Florida seal is centered in the background. The seal features a palm tree, a sun, and a beach scene, surrounded by the text "PALM BEACH COUNTY" and "FLORIDA".

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Facebook**

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