

Children's Services Council of Leon County (CSC Leon)
Governing Council Meeting

Thursday, January 19, 2022, 3:00 p.m.

CSC Leon Training Room

2002 Old St. Augustine Road, Ste. A-50, Tallahassee, FL 32301

Members of the public can view the meeting via live stream, when available, on this YouTube channel:
<https://www.youtube.com/channel/UCc74A9evhLxbHlrH63-clbQ>.

AGENDA

- I. Call to Order
- II. Roll Call
- III. Approval of Agenda
- IV. General Public Comment
- V. Community Impact Stories
 - A. Young Engineers Tallahassee, Khary Henry
- VI. Approval of Consent Agenda Items
 - A. Minutes from the December 2022 meeting (pg. 3)
 - B. Minutes from the final TRIM Hearing (pg. 7)
 - C. Financial Report from December 2022 (pg. 9)
 - D. Quarter 1 Financial Report from October-December 2022
 - E. Executive Director's Report (pg. 13)
- VII. Committees & Reports
 - A. Financial Auditing Solicitation Committee (pg. 37)
 - i. Presentation of Intent to Award Recommendation
 - ii. Public Comment
 - iii. Consideration to Approve Recommendation
 - B. Capacity Building ITN Workgroup (p. 39)
 - i. Presentation of Final Contract for Capacity Building Services
 - ii. Public Comment
 - iii. Consideration to Approve Final Contract
 - C. Investment Workgroup (pg. 67)
 - i. Presentation of Draft Reserves Policy (pg. 69)
 - ii. Presentation of Draft Request for Information for Investment Advisory Firm (pg. 71)
 - D. Program Services Committee (pg. 77)
 - i. Presentation of Draft Community Investment Partner (CIP) Fiscal Policies (pg. 79)
 - ii. Presentation of Draft CIP Data Security Policy (pg. 101)
 - iii. Presentation of Draft RFA for Summer Bridge Funding (pg. 105)
 - E. Executive Committee
 - i. Executive Director's Contract Update
- VIII. Next Meeting Dates
- IX. Next Meeting Agenda
- X. Member Comments
- XI. Adjourn

CHILDREN'S SERVICES COUNCIL OF LEON COUNTY
Governing Council Meeting
December 15, 2022

MINUTES

Members Present:

- Dr. Zandra Glenn, Chair, Community Member;
- Terrence Watts, Vice-Chair, DCF Appointee;
- Paul Mitchell, Treasurer, Community Member;
- Carmen Conner, Community Member;
- Atty. Carolyn Cummings, Leon County Commissioner;
- Liza McFadden, Community Member;
- Judge Anthony Miller, Second Judicial Circuit;
- Rocky Hanna, Superintendent, Leon County Schools;
- Darryl Jones, School Board Chair, Leon County Schools; and
- Mark O'Bryant, Community Member.

Staff Present:

- Cecka Rose Green, Executive Director;
- Dina Snider, Director of Finance and Operations;
- Stephanie Eller Vaughn, Program Accountability and Research Manager;
- Jacinta Clay, Administrative Services Manager;
- Holly McPhail, Special Projects Manager; and
- Christopher Roe, General Counsel.

Location:

The Children's Forum
1211 Governor's Square Blvd., Suite 200, Tallahassee, FL 32301

I. CALL TO ORDER

Chair Glenn called the meeting to order at 4:03 p.m., provided greetings to the council and reminded the public about opportunities for comments.

II. ROLL CALL

Ten (10) council members were present, and quorum was established.

III. APPROVAL OF AGENDA

Chair Glenn asked for a motion to approve the agenda. Mr. Jones moved to approve; a second was provided by Judge Miller. The agenda was unanimously approved.

IV. GENERAL PUBLIC COMMENT

General public comment was provided by Mr. Jack Levine.

V. COMMUNITY IMPACT STORIES

- A. ASPIRE – Ms. Morgan Evers
- B. Teenpreneur Foundation – Mrs. Jennifer Donald

VI. APPROVAL OF CONSENT AGENDA

Chair Glenn asked for a motion to approve the consent agenda. Mr. Jones moved approval; Ms. Conner provided a second. Consent agenda was unanimously approved.

VII. GENERAL COUNSEL UPDATE

Mr. Roe reminded Council Members to contact him with any questions regarding the conflicts of interest presentation from last month's meeting.

VIII. COMMITTEES & REPORTS

A. EXECUTIVE COMMITTEE

i. TRIM Update

Ms. Green provided update on the TRIM process and need for a re-hearing and re-adoption of both the resolutions for final millage rate and budget. The final hearing will take place at 6:05 p.m., following today's General Council Meeting, as duly advertised.

ii. Executive Director's Evaluation and Recommendation on Contract/Compensation

Mr. Roe presented the results of the Executive Director's evaluation, including three actions the Council needed to take: (1) The retention of Ms. Green for the term 2023-2024; (2) merit increase of \$5,000.00 to raise the Executive Directors' salary from \$120,000 to \$125,000; and (3) extension of the Executive Director's contract from now until the presentation of the new contract at the January 2023 General Council Meeting.

Mr. O'Bryant moved to retain Cecka Rose Green as the Executive Director of the Children's Services Council [of Leon County] for Fiscal Year 2023-2024; a second was provided by Ms. Cummings. There was no public comment, and the motion was approved unanimously.

Mr. O'Bryant moved to award Ms. Green the \$5,000 salary increase; a second was provided by Ms. Cummings. Public comment was provided by Mr. K. Lennorris Barber. The motion was approved by 9-1 vote.

Mr. Mitchell moved to extend Ms. Green's contract until next month's meeting; a second was provided by Mr. Hannah. There was no public comment, and the motion was approved unanimously.

B. PROGRAM SERVICES COMMITTEE

i. Capacity Building Services Procurement

Ms. McPhail presented the process for the Capacity Building procurement. Dr. Irene Gaines, Lead Negotiator for the evaluation committee, presented their recommendation to award United Partners for Human Services (UPHS) in partnership with the Institute for Nonprofit Innovation and Excellence (INIE) with the contract. Mr. Jones moved to approve the intent to award; a second was provided by Ms. Cummings. There was no public comment, and the motion was approved unanimously. Final contract to approve will be presented at the January 2023 Governing Council meeting.

IX. CONTINUED DISCUSSION: DRAFT STRATEGIC FRAMEWORK 2023-2025

Ms. Green provided an overview of the Council's previous discussion on the High-Quality Early Learning category. Following the discussion, the Council requested the category be taken to the Program Services Committee for further discussion and development of recommendations. Subsequently, Dr. Glenn suggested that all strategies presented in the framework go through the Program Services Committee.

X. UPCOMING EVENTS

The Grand Opening of the CSC Leon Community Resource Room, Meeting Facility and Office has been rescheduled to be held on Friday, February 17, 2023, from 3:00 – 6:00 p.m. at the new office location (2002 St. Augustine Road, Ste. A-50, Tallahassee, FL 32301). Also, three (3) Family Listening Sessions will be held on Thursday, January 26, at Sabal Palm Elementary; Tuesday, January 31, at Jack McLean Community Center; and Wednesday, February 1, at Lake Jackson Community Center. All session will begin at 5: 30 p.m., with food and childcare available at each.

XI. NEXT MEETING DATES

A list of upcoming meeting dates was included in the packet as an attachment and is available on the Council's website.

XII. NEXT MEETING AGENDA REVIEW

- Community Impact Story
- Presentation of the Executive Director's Contract
- Integrated Information Management System (IIMS) Status Update
- Presentation of Recommendation for Award of Financial Audit Services RFP
- Presentations of Draft Reserves Policy
- Presentation of Draft Investment Advisory Firm RFI
- Presentation of Draft Community Investment Partners (CIP) Funding Policy
- Presentations of Draft Summer Bridge Programs RFA
- Approve Capacity Building Contract
- Presentation of draft Strategic Framework 2023-2025

XIII. MEMBER COMMENTS

Mr. Mitchell asked that the Community Impact Stories include in their presentation how many youth/families were served and the funding the program received.

XIV. ADJOURNMENT

Meeting was adjourned at 6:07 p.m.

CHILDREN'S SERVICES COUNCIL OF LEON COUNTY
Final TRIM Re-Hearing
Thursday, December 15, 2022

MINUTES

Members Present:

- Dr. Zandra Glenn, Chair, Community Member;
- Terrence Watts, Vice-Chair, DCF Appointee;
- Paul Mitchell, Treasurer, Community Member;
- Atty. Carolyn Cummings, Leon County Commissioner;
- Rocky Hanna, Superintendent, Leon County Schools;
- Liza McFadden, Community Member; and
- Judge Anthony Miller, Second Judicial Circuit

Members Absent:

- Carmen Conner, Community Member;
- Darryl Jones, School Board Chair, Leon County Schools; and
- Mark O'Bryant, Community Member.

Staff Present:

- Cecka Rose Green, Executive Director;
- Dina Snider, Director of Finance and Operations;
- Jacinta Clay, Administrative Services Manager;
- Holly McPhail, Special Projects Manager;
- Stephanie Eller Vaughn, Program Accountability and Research Manager;
- Atty. Christopher Roe, General Counsel.

Location:

The Children's Forum
1211 Governors Square Blvd., Suite 200, Tallahassee, FL 32301
First Floor Conference Room

I. CALL TO ORDER

Chair Glenn called the meeting to order at 6:09 p.m.

II. ROLL CALL

Seven council members were present, and a quorum was established.

III. APPROVAL OF AGENDA

Comm. Cummings moved to approve the agenda; Mr. Mitchell seconded the motion. Motion was unanimously approved.

IV. TRIM OVERVIEW & PUBLIC READING

Chair Glenn read the Truth in Millage process to the body as below:

- Truth in Millage, or “TRIM”, engages taxpayers and the public in the process by which local taxing authorities determine the amount of ad valorem property taxes they are requesting to fund their next years’ budgets.
- On December 29, 2022, the Florida Department of Revenue, Property Tax Oversight, notified CSC Leon staff of errors in the published TRIM advertisement and budget summary.
- As such, to comply with the “Opportunity To Remedy” these errors, CSC Leon re-advertised both the tentative millage rate and budget summary on Monday, December 12, 2022.
- Additionally, the Remedy requires that CSC Leon re-hold the final TRIM hearing. Therefore, in accordance with Title 14, Chapter 200, Section 001, Subsection 4(a) and (b) of the Florida Statutes, which governs the TRIM process, today will serve as the final public hearing for this Council to approve the millage rate to levy ad valorem taxes in Fiscal Year 2022-23.
- This TRIM Public Hearing is being held by the Children’s Services Council of Leon County, or CSC Leon—an independent special district established and governed by Section 125.901, Florida Statutes, and Leon County Ordinance 2018-3.
- The percentage increase in millage over the rolled-back rate of .3482 needed to fund the budget for FY 2022-23 is 7.70%, which will be an increase of \$650,290.33 in ad valorem tax revenues from current year.
- The tentative millage rate CSC Leon is requesting is .375 mill, which is the SAME millage rate as approved for current year, 2021-22.
- At today’s public hearing, CSC Leon intends to re-adopt our FINAL millage rate of .375 mill and fiscal year 2022-23 budget.

V. RESOLUTION 2022-11 to SET FY 2022-23 FINAL MILLAGE RATE

Chair Glenn asked Mr. Roe to read Resolution 2022-11. There was no public comment. Comm Cummings moved to approve Resolution 2022-11; a second was provided by Mr. Mitchell, and it was approved unanimously. Judge Miller sustained from voting on final millage rate, per state law.

VI. RESOLUTION 2022-12 to SET FY 2022-23 FINAL BUDGET

Chair Glenn asked Mr. Roe to read Resolution 2022-12. There was no public comment. Mr. Mitchell moved to approve Resolution 2022-12; a second was provided by Mr. Hanna, and it was approved unanimously.

VII. MEMBER COMMENTS

There were no member comments.

VIII. ADJOURNMENT

Meeting was adjourned at 6:17 p.m.

Children's Services Council of Leon County
Balance Sheet
As of December 31, 2022

	<u>Dec 31, 22</u>
ASSETS	
Current Assets	
Checking/Savings	
Money Market Account	4,281,350.24
Operating	6,745,937.10
Total Checking/Savings	11,027,287.34
Other Current Assets	
Prepaid Rent	12,445.00
Total Other Current Assets	12,445.00
Total Current Assets	11,039,732.34
Other Assets	
Security Deposits Asset	6,222.50
Total Other Assets	6,222.50
TOTAL ASSETS	<u>11,045,954.84</u>
LIABILITIES & EQUITY	
Equity	
Unrestricted Net Assets	4,609,659.83
Net Income	6,436,295.01
Total Equity	11,045,954.84
TOTAL LIABILITIES & EQUITY	<u>11,045,954.84</u>

Children's Services Council of Leon County
Income & Expense Budget vs. Actual
October through December 2022

	Oct - Dec 22	Budget	\$ Over Budget	% of Budget
Ordinary Income/Expense				
Income				
Ad Valorem Proceeds	6,615,282.75	7,632,396.32	-1,017,113.57	86.7%
Interest	19,006.98	10,057.10	8,949.88	189.0%
Total Income	6,634,289.73	7,642,453.42	-1,008,163.69	86.8%
Expense				
Compensation /Employee Benefits				
Dental & Vision Insurance	-68.40			
Employee Benefits (Other)	0.00	2,000.00	-2,000.00	0.0%
Health Insurance	9,937.83	80,000.00	-70,062.17	12.4%
Payroll taxes	6,381.03	29,484.00	-23,102.97	21.6%
Retirement Contribution	11,698.80	80,660.00	-68,961.20	14.5%
Salaries	81,153.81	323,000.00	-241,846.19	25.1%
Total Compensation /Employee Benefits	109,103.07	515,144.00	-406,040.93	21.2%
Contractual Services				
Accounting Fees	3,112.50	30,000.00	-26,887.50	10.4%
AmeriCorp Vists	0.00	10,000.00	-10,000.00	0.0%
External Audit Fee	0.00	20,000.00	-20,000.00	0.0%
General Counsel (1099-MISC)	38,730.25	75,000.00	-36,269.75	51.6%
Grantwriting Services	0.00	50,000.00	-50,000.00	0.0%
Program Specialist & Admin.	20,000.00	60,000.00	-40,000.00	33.3%
Total Contractual Services	61,842.75	245,000.00	-183,157.25	25.2%
Operations				
Ad Valorem Collection Fees	0.00	230,771.89	-230,771.89	0.0%
Awards & Recognition	0.00	500.00	-500.00	0.0%
Communications	0.00	5,200.00	-5,200.00	0.0%
Community Awareness/Engagement	0.00	20,000.00	-20,000.00	0.0%
Dues & Subscription	775.00	15,000.00	-14,225.00	5.2%
Equipment	0.00	11,000.00	-11,000.00	0.0%
Furniture	0.00	1,000.00	-1,000.00	0.0%
Insurance (Liab., D&O, WC)	14,494.00	17,500.00	-3,006.00	82.8%
IT Hardware	2,561.72	5,000.00	-2,438.28	51.2%
IT Services (Web & Email)	434.99	1,500.00	-1,065.01	29.0%
Licenses & Fees	0.00	1,000.00	-1,000.00	0.0%
Misc expenses	405.03	5,000.00	-4,594.97	8.1%
Occupancy (Rent, Util., Janito)	0.00	74,670.00	-74,670.00	0.0%
Office Supplies	39.08	5,200.00	-5,160.92	0.8%
Payroll processing / HR	4,435.68	10,000.00	-5,564.32	44.4%
Postage and Courier	0.00	750.00	-750.00	0.0%
Printing and Copying	308.17	2,000.00	-1,691.83	15.4%
Program & Financial Software	0.00	150,000.00	-150,000.00	0.0%
Public Relations	0.00	50,000.00	-50,000.00	0.0%
Publication (Legal Adv)	10.64	0.00	10.64	100.0%
Research	0.00	4,000.00	-4,000.00	0.0%
Software	239.82	3,000.00	-2,760.18	8.0%
Sponsorship	0.00	8,000.00	-8,000.00	0.0%
Travel and Meetings				
Conference, Convention, Meeting	1,929.09	12,000.00	-10,070.91	16.1%
Travel (mileage)	775.68	9,000.00	-8,224.32	8.6%
Travel and Meetings - Other	640.00			
Total Travel and Meetings	3,344.77	21,000.00	-17,655.23	15.9%
Total Operations	27,048.90	642,091.89	-615,042.99	4.2%
Program Investments				
Capacity Building	0.00	120,000.00	-120,000.00	0.0%
Innovation Funding	0.00	1,500,000.00	-1,500,000.00	0.0%
Priority Funding	0.00	7,502,906.30	-7,502,906.30	0.0%
Summer Programmatic Funding	0.00	1,600,000.00	-1,600,000.00	0.0%
Total Program Investments	0.00	10,722,906.30	-10,722,906.30	0.0%

	Oct - Dec 22	Budget	\$ Over Budget	% of Budget
Reserves/Community Grants	0.00	381,619.82	-381,619.82	0.0%
Total Expense	197,994.72	12,506,762.01	-12,308,767.29	1.6%
Net Ordinary Income	6,436,295.01	-4,864,308.59	11,300,603.60	-132.3%
Net Income	6,436,295.01	-4,864,308.59	11,300,603.60	-132.3%

Children's Services Council of Leon County
Income & Expense Report
October through December 2022

	Oct 22	Nov 22	Dec 22	TOTAL
Ordinary Income/Expense				
Income				
Ad Valorem Proceeds	639.01	601,268.49	6,013,375.25	6,615,282.75
Interest	6,347.00	6,152.33	6,507.65	19,006.98
Total Income	6,986.01	607,420.82	6,019,882.90	6,634,289.73
Expense				
Compensation /Employee Benefits				
Dental & Vision Insurance	0.00	11.18	-79.58	-68.40
Health Insurance	3,318.51	3,318.51	3,300.81	9,937.83
Payroll taxes	1,454.52	2,060.98	2,865.53	6,381.03
Retirement Contribution	5,586.77	2,420.33	3,691.70	11,698.80
Salaries	19,230.76	24,769.22	37,153.83	81,153.81
Total Compensation /Employee Benefits	29,590.56	32,580.22	46,932.29	109,103.07
Contractual Services				
Accounting Fees	1,125.00	0.00	1,987.50	3,112.50
General Counsel (1099-MISC)	11,266.00	9,449.00	18,015.25	38,730.25
Program Specialist & Admin.	5,000.00	5,000.00	10,000.00	20,000.00
Total Contractual Services	17,391.00	14,449.00	30,002.75	61,842.75
Operations				
Dues & Subscription	0.00	600.00	175.00	775.00
Insurance (Liab., D&O, WC)	0.00	0.00	14,494.00	14,494.00
IT Hardware	0.00	1,213.67	1,348.05	2,561.72
IT Services (Web & Email)	0.00	273.80	161.19	434.99
Misc expenses	405.03	0.00	0.00	405.03
Office Supplies	0.00	39.08	0.00	39.08
Payroll processing / HR	1,251.58	1,273.64	1,910.46	4,435.68
Printing and Copying	134.99	27.52	145.66	308.17
Publication (Legal Adv)	0.00	10.64	0.00	10.64
Software	79.85	79.14	80.83	239.82
Travel and Meetings				
Conference, Convention, Meeting	1,631.64	15.00	282.45	1,929.09
Travel (mileage)	820.32	-44.64	0.00	775.68
Travel and Meetings - Other	0.00	0.00	640.00	640.00
Total Travel and Meetings	2,451.96	-29.64	922.45	3,344.77
Total Operations	4,323.41	3,487.85	19,237.64	27,048.90
Total Expense	51,304.97	50,517.07	96,172.68	197,994.72
Net Ordinary Income	-44,318.96	556,903.75	5,923,710.22	6,436,295.01
Net Income	-44,318.96	556,903.75	5,923,710.22	6,436,295.01

Executive Director's Report
Governing Council Meeting | Thursday, January 19, 2023

2022 Annual and 2022-23 1st Quarter Reports to Leon County Government

The governing statute for Children's Services Councils requires that each Council submit an annual report of its activities for the previous fiscal year on or before January 1. CSC Leon's annual report was submitted to Leon County Government on Thursday, December 29, 2022.

Additionally, each CSC must submit quarterly financial reports to the respective local government by the 10th day following the close of the quarter. CSC Leon submitted its 2022-23 1st Quarter Report to Leon County on Monday, January 9. Both reports are included in this month's Council Meeting Packet.

FACCT Update

Florida Alliance of Children's Councils and Trusts (FACCT) Legislative Fly-In will be on Wednesday and Thursday, March 15 and 16, 2023, in Tallahassee. This is a time when the CSC Executive Directors/CEOs and Council Chairs/Vice Chairs come to town to hear from various legislators regarding their focus on issues affecting our children and families in the state. Additionally, it is an opportunity for them to visit with their legislative delegation during Session. As this event approaches, CSC Leon staff will provide additional information and ascertain if any additional CSC Leon Council Members want to participate.

CSC Leon Listening Sessions – Family Support Services

By way of reminder, CSC Leon will host Listening Sessions in January and February to specifically discuss needs surrounding family support services. Sessions are scheduled to be held as follows:

- Thursday, January 26 – Sabal Palm Elementary Community Partnership School, 2813 Ridgeway Street, 32310
- Tuesday, January 31 – Jack McLean Community Center, 700 Paul Russell Road, 32301
- Wednesday, February 1 – Lake Jackson Community Center, 3840 N. Monroe Street, 32303

All sessions will start at 5:30 p.m. Council Members may attend, and guidance was sent to each Council Member; also, it is included in this month's Council Meeting Packet.

Follow up on TRIM Re-Hearing

As a follow-up from the TRIM re-hearing held on Thursday, December 15—during which the Council re-adopted the final millage rate and the final budget for FY 2022-23—the Florida Department of Revenue, Property Tax Oversight, TRIM Division, sent correspondence stating that CSC Leon has met the certification requirements of the applicable TRIM statutes. As such, the Council started receiving ad valorem tax revenue with no interruption. The letter is included in the Council Meeting Packet, as are the minutes for the re-hearing.

CSC Leon "Branding Design" Poll

As the Grand Opening of CSC Leon's office is on the horizon, staff is working with a vendor to create our brand and official colors. As such, three versions of our logo will be created with an accompanying poll for the community to vote for their preferred logo, which will weigh into the chosen branding for CSC

Leon. The poll will be presented to participants at the Family Support Services Listening Sessions, as well as placed on our website. The selected design will be unveiled at the Grand Opening.

CSC Leon Office Grand Opening:

Speaking of grand openings, by way of reminder, the Grand Opening and Ribbon-Cutting of the CSC Leon Community Resource Room, Meeting Facility and Office **will be on Friday, February 17, 2023**, at the new office, located at 2002 St. Augustine Road, Ste. A-50, 32301. The ribbon-cutting will be at 10:00 a.m., with the open house from 3:00 – 6:00 p.m. Staff is compiling the invitation list; please feel free to submit any individuals and/or organizations to be included on the list. Invitations will be sent via email with an RSVP link.

Council Member Appointments

The last day to apply to be appointed to serve on the Council was Friday, January 6, 2023; a total of 15 community members have submitted applications. The list will be presented to the Leon County Board of County Commissioners later this month at their regular meeting. Commissioners will select at least three recommendations for each of the two upcoming vacancies [a minimum total of six (6) candidates].

Submitted by:

Cecka Rose Green, CPM
Executive Director

Children's Services Council of Leon County
Quarterly Financial Report
October 1, 2022 thru December 30, 2022

Pursuant to s. 125.901(3)(f), Florida Statutes, the Children's Services Council of Leon County provides the following financial report to Leon County.

1. The total expenditures of the Council for the quarter annual period -
\$197,994.72
2. The total receipts of the Council during the quarter annual period -
\$6,634,289.73
3. A statement of the funds the Council has on hand, has invested, or has deposited with qualified public depositories at the end of the quarter annual period
 - a. The Council currently has \$11,027,287.34 on deposit at Prime Meridian Bank.
4. The total administrative costs of the Council for the quarter annual period -
\$197,994.72

By: John M. Grayson, CPA

Title: Accountant



Florida Department of Revenue
Property Tax Oversight

Jim Zingale
Executive Director

5050 West Tennessee Street, Tallahassee, FL 32399

floridarevenue.com

January 4, 2023

Cecka R. Green, Executive Director
Children's Services Council of Leon County
301 S. Monroe Street
Tallahassee, Florida 32301

Re: Truth in Millage (TRIM) Certification

Dear Ms. Green:

The Department of Revenue (Department) has reviewed the revised and re-advertised millage certification documents that your taxing authority submitted and has determined that the certification requirements of subsections 200.065(1)-(4), (6)-(12), (14), and (15), Florida Statutes (F.S.), and section (s.) 200.068, F.S., have been met. From that certification, the Department has found no violation of, and accepts the certification as meeting the requirements of the listed subsections of s. 200.065, F.S.

This determination applies only to the TRIM certification requirements in the listed subsections of s. 200.065, F.S. The Department will send a determination regarding the maximum millage levy requirements of s. 200.065(5), F.S., in a separate notice.

By copy of this notice, the Department is notifying and directing the tax collector to disburse all funds held in escrow and is notifying the Refunds and Distribution process of the General Tax Administration program to disburse the revenue sharing funds under the normal disbursement process beginning with the next disbursement after this date.

Thank you for your prompt attention to this matter.

Sincerely,

Rene Lewis, Program Director
Property Tax Oversight

Cecka R. Green, Executive Director
January 4, 2023
Florida Department of Revenue
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Cc: Honorable Doris H. Maloy, CFC
Leon County Tax Collector

Andrea Hunter, Revenue Program Administrator
Florida Department of Revenue
Refunds and Revenue Accounting

GS/#47.05

Children's Services Council of Leon County 2022 Annual Report



As required by Section 125.901(2)b.5, Florida Statutes, the Children's Services Council of Leon County (CSC Leon) respectfully submits this 2022 Annual Report to the Leon County Commission.

The Council convened its first meeting in Fiscal Year 2021-2022 on Thursday, October 21, 2022, holding a total of 12 Governing Council meetings, in addition to various committee meetings. CSC Leon's work built on the foundation that was laid in the previous year for successfully fulfilling its statutory responsibilities. Last fiscal year, CSC Leon accomplished the following:

- ✓ Hired an Executive Director on January 1.
- ✓ Hired two full-time staff (Director of Finance and Operations, and Administrative Services Manager) and retained one contract staff (Special Projects Manager).
- ✓ Selected a new Council Officers.
- ✓ Hosted Community Conversations—including youth only sessions—to give citizens opportunities to provide input on programming needs.
- ✓ Completed the required Comprehensive Needs Assessment (June 2020), including possible funding recommendations for Council consideration.
- ✓ Completed first funding cycle (Summer 2022 Community Funding)—issued Request for Applications (RFA), secured evaluation volunteers to score applications, awarded funding, and issued a final funding report (attached).
- ✓ Completed strategic planning (July 2022) and started strategic framework development.
- ✓ Completed the Truth in Millage (TRIM) process, adopting final millage rate and FY 2022-2023 budget.
- ✓ Secured CSC Leon Office location and began renovations to include training and meeting spaces for use by the community.

Below are the statutorily required areas addressed in this 2022 Annual Report. Responses are italicized.

I. Information on the effectiveness of activities, services, and programs offered by the Council, including cost-effectiveness.

During the past fiscal year, CSC Leon completed its first funding cycle—Summer 2022 Community Funding—as one-time, short-term investments (June 1 – August 30) to provide summer learning opportunities across the Council's three priority areas:

- *Success in School and Life;*
- *Healthy Children, Youth and Families; and*
- *Stable and Nurturing Families and Communities.*

Funded programs addressed the following areas:

- *Keeping kids engaged and off the streets.*
- *Overcoming transportation barriers.*
- *Improving data collection.*
- *Enhancing hands-on learning.*
- *Building workforce readiness skills.*
- *Providing creative spaces for career exploration.*
- *Improving access to mental health resources.*
- *Better educating the community on society needs, including recognizing signs of and responding to human trafficking situations.*

Total awarded investment was \$1,565,481.69 issued through 29 contracts to fund the expansion of 30 existing programs; the projected impact was more than 10,000 children, youth, and families.

This first funding cycle reinforced that there is no one, stand-alone solution to address childhood concerns and support youth development; rather, there are several solutions, many of which are interrelated and reliant on one another to result in positive impacts on child and family well-being, and to promote student achievement. The solutions funded crossed priority areas and were successful due to the intentional collaboration of providers, including business, industry, nonprofits, and faith-based organizations.

*As such, the **adjusted investment was \$1,529,366.41** (\$36,490.27 in unused funds was returned), resulting in a **total of 34,103 children, youth, and families—310.25% of goal—served** through this summer investment (CSC Leon funds only). Additionally, most of the families benefiting from summer programming resided in 32303 and 32304 zip codes.*

II. Detailed anticipated budget for continuation of activities, services, and programs offered by the Council, and a list of all sources of requested funding, both public and private.

*For Fiscal Year 2022-2023, the Council approved a total of \$10.7 million to fund programming in accordance with the needs assessment, and as determined by the strategic framework; contained therein is **\$1.5 million in ad valorem tax revenue to award to providers for Summer 2023 Bridge Program funding.***

*However, **this will not be continuation funding** from the previous summer; while it also will be one-time, short-term funding most likely focusing on increased access to high-quality expanded learning and feeding opportunities, the focus will not be to continue programming from the previous summer.*

III. Procedures used for early identification of at-risk children who need additional or continued services and methods for ensuring that the additional or continued services are received.

CSC Leon's comprehensive needs assessment was completed in June 2022; subsequently, using the information from the assessment, and community and provider input, the Council held a strategic planning session in July 2022 to start identifying prospective provider investments. In October 2022, staff created the 2023-2025 CSC Leon Strategic Framework, and currently, the Council is reviewing and fine-tuning the framework.

IV. A description of the degree to which the Council’s objectives and activities are consistent with the goals of this section.

As required by this section, the CSC Leon completed the comprehensive needs assessment, including soliciting input from the community and providers; held strategic planning informed by the needs assessment; is developing a strategic framework to further refine strategic focus and future programs investments; and determined the need to continue Summer Bridge Funding, given the positive impact of the Summer 2022 Community Funding. The work that CSC Leon accomplished this past year continued to support the statutory objectives to: 1) provide and maintain preventive, developmental, treatment, and rehabilitative services for children; 2) provide such other services for all children as to support the general welfare of the county; 3) allocate and provide funds for other agencies in the county that are operated for the benefit of children; and 4) coordinate with other agencies dedicated to the welfare of children to prevent duplication of services.

V. Detailed information on the various programs, services, and activities available to participants and the degree to which the programs, services, and activities have been successfully used by children.

As aforementioned, during Summer 2022, the Council issued 29 contracts to fund the expansion of 30 existing programs. The “Summer 2022 Community Funding Report” is attached to this Annual Report, listing the various programs, services, activities, families served by zip code and age range, breakdown of the number of programs funded for each CSC Leon priority (Success in School and Life; Healthy Children, Youth and Families; and Stable and Nurturing Families and Communities); impact stories for each priority; and a complete listing of all programs funded by amount.

VI. Information on programs, services, and activities that should be eliminated; programs, services, and activities that should be continued; and programs, services, and activities that should be added to the basic format of the Children’s Services Council.

CSC Leon has not been in existence long enough, nor had more than one funding cycle (one-time and short-term) to determine which programs to eliminate and/or continue, expand, or add.

Submitted by: Cecka Rose Green, CPM

Title: Executive Director

Date: Friday, December 30, 2022



Children's Services Council of Leon County Summer 2022 Community Funding Report

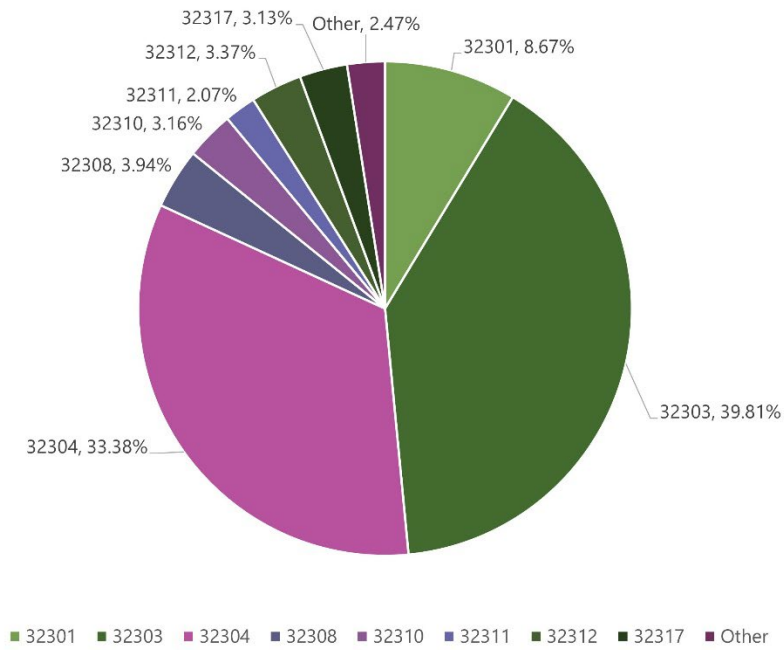
The Children's Services Council of Leon County (CSC Leon) issued 29 contracts to fund the expansion of 30 existing programs during summer 2022. These one-time, short-term investments totaled \$1,565,481.69 across the three priority areas and were projected to impact more than 10,000 children, youth and families. Funding was used to provide summer learning opportunities to keep kids engaged and off the streets, as well as overcome transportation barriers, improve data collection, enhance hands-on learning, build workforce readiness skills, provide creative spaces for career exploration, improve access to mental health resources, and better educate the community on societal needs including recognizing the signs of and responding to human trafficking situations.

This first funding cycle reinforced that there is no one, stand-alone solution to address childhood concerns and support youth development. Rather, there are several solutions, many of which are interrelated and reliant on one another to result in positive impacts on child and family well-being, and promote student achievement. The solutions levied this summer crossed over priority areas and worked because providers—including business, industry, nonprofits and faith-based providers—intentionally collaborated together.

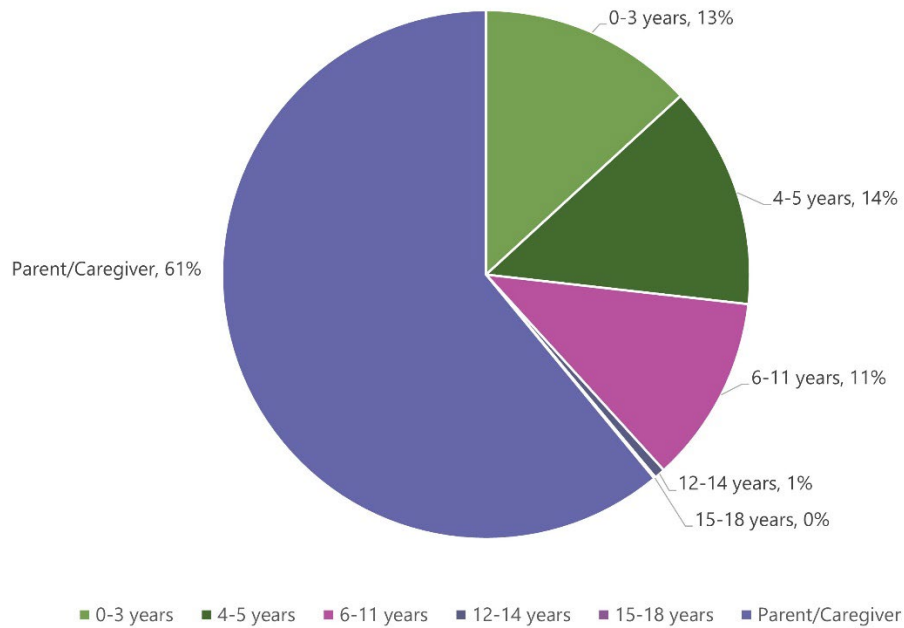
TOTAL INVESTMENT: \$1,565,856.68
TOTAL RETURNED (EXPECTED): \$36,490.27
ADJUSTED INVESTMENT: \$1,529,366.41
TOTAL FAMILIES PROJECTED: 10,992
TOTAL FAMILIES SERVED: 34,103 (CSC FUNDS ONLY)
% TO GOAL: 310.25%

In total, 34,103 children, youth and families were served during summer 2022 with the majority of those families residing in 32303 and 32304. A detailed description of each priority area and program is provided.

Families Served by Zip Code



Families Served by Age Range



Success in School & Life: Investment of \$824,678.31

Number of Programs: 17

Families Served: 2,093 (+502)

The programs funded in this category expanded available summer learning opportunities to children and youth across the entire community, with a specific focus on Title 1 neighborhoods. More than 2,000 children and youth participated in no to low-cost summer camps and other expanded learning opportunities. In addition, 502 more children and youth already engaged in these programs benefited from higher quality curricula and/or more days of programming. For example, 21st Century Community Learning Centers were able to accept more students at nine Title 1 schools in Leon County and extend the duration of their summer program for all participants to be Monday-Friday instead of closed on Fridays (close to 700 children and youth funded by other efforts).

The funded summer learning programs are expected to impact the CSC Leon identified domains of school readiness, school-age supports, and youth development. Most programs focused on increasing academic gains and mitigating learning loss associated with the “summer slide” and long-term impacts of COVID. However, some programs focused on providing workforce ready skill development associated with STEM curricula or building resiliency through arts education and social-emotional learning. One of the programs funded, Geeks and Gramps, paired young people with seniors in their community to help with technology skill acquisition through an intergenerational approach that met a social-emotional need for all participants.

IMPACT STORY FROM THE BOYS AND GIRLS CLUB OF THE BIG BEND

We used the Special CSC Summer Funding to target families and youth who recently relocated from the Tallahassee Housing Authority property located off Orange Avenue. These residents would not have the opportunity for free summer programming in their neighborhood due to the relocation. One family in particular was contacted by the Club Director at the Springfield Boys & Girls Club and informed about the free summer camp and programming being offered at the Boys & Girls Club that was made possible by the CSC special summer funding grant. This parent was overjoyed and explained that her only option was to leave her child home alone because she had to work and could not afford summer camp. Our program gave her child a fun filled summer in a safe and positive environment.

IMPACT STORY FROM DREAM BUILDERS GREATNESS CENTER

During the Summer 2022, the Kingdom Life Camp Squad had the awesome privilege of working with a community partner to enhance our Summer Enrichment Program. The **Dream Builder's Greatness Center** Family Affairs Program under the leadership of Dr. Judy Mandrell came in once a week to work with our students. They worked on self-esteem, self-empowerment, vision casting, and learning how to "Show Up for You!" The students made a video and wrote two original songs around the lesson they gleaned and learned from Dr. Mandrell. It was an Emoji Summer. We spent most of the time and various activities helping the student get in tune with their emotions and feeling. It was a time of fun and relaxation.

The creativity that was birthed from this special project was breath taking. The kids were grateful and have not stopped talking about the whole experience of the summer's activities. They learned how to use their voice and voice their feelings and opinions in a safe and therapeutic environment. Thank you, Dr. Judy, for partnering with us and making Summer 2022 one to remember, giving hope and reassurance to the students that **THIER LIVES MATTER!**

Healthy Children, Youth & Families: Investment – \$211,163.86

Number of programs: 4

Families Served: 1,171 (+242)

The programs funded in this category expanded access to mental health services and support specifically for children and youth. This included partnering with existing summer camps to offer mental health services as part of those programs, offering group and individual family sessions, improving existing mental health navigation and support tools, and providing free transportation to families to access mental health services. Reports from programs indicate that 1,413 families benefited directly from these programs, with close to 3,000 additional families benefiting from the improvement of the community referral database.

The funded mental health programs are expected to impact the CSC Leon identified domains of mental health, youth development and enhanced supports for caregivers.

IMPACT STORY FROM TURN ABOUT

Madi G. was a 14-year-old teen who initially came to **Turn About, Inc's** Summer Camp in 2021, after struggling with mental health and developmental issues. She had been in a crisis just the weekend prior but agreed with her mother to attend camp the following Monday. After participating daily in the groups with her fellow campers, who seemed to be most accepting of her, Madi's issues remitted. During camp, the Art Therapist on staff noticed Madi's propensity for art and she actually became the inspiration for the development of an art group that was added into Turn About's group curriculum and schedule. She continued attending art group after school and later received a fellowship to a local arts program (twice!) in The Railroad Square District. She did not have another crisis the entire 8 weeks of camp. Her mother stated that the safe space that the group and agency provided made the difference for her daughter.

This year when advertisement and information was posted for summer camp, Madi returned and was instrumental in making the space safe for new campers. Her consistent attendance and participation added to the process of health and wellness for this camp. In essence, Madi was the walking example of "passing it on." What she received, she continued to pass on to others. By the way, she continues to be active in the arts program.

Stable and Nurturing Families & Community: Investment – \$529, 639.51

Number of programs: 9

Families Served: 30,815 (+82,641)

The programs funded in this category expanded available supports for families and youth, such as parenting classes, community navigation services, workforce development tools, direct financial assistance, access to food, transportation and more. Some programs used a model of parents and youth learning together, while others focused specifically on parent education or one-on-one navigation support. Topics included kindergarten registration, school attendance, college and career readiness, financial literacy, accessing legal services, etc. Through the expansive reach of food distribution efforts, technology-based platforms, and community events, these combined efforts had a positive impact on more than 30,000 families.

The funded family and youth support programs are expected to impact the CSC Leon-identified domains of enhanced supports for caregivers, youth development, housing stability, food stability and school readiness.

IMPACT STORY FROM HANG TOUGH FOUNDATION

For families with medical and special needs, a visit to a store can be a stressful situation. Parents of medical and special needs children cannot simply run in and out of the store for a quick trip due to compromised immune systems and social behaviors. Despite meticulous saving and budgeting, there are always financial stressors for a medical or special needs family. This is true for parents Caroline and Jacob and their son Luke. Luke has Down Syndrome and autism. He is a happy, energetic boy who is learning to navigate social situations with the help of an ABA therapist but has a tendency to elope and yell in public situations. Luke also does not like waiting! Shopping can be difficult with Luke in tow. Caroline remarked that “the school supply drive made gathering school supplies a huge convenience.” The drive also relieved financial stressors for their family due to the extreme amount of therapies, specialist appointments, and daily expenses incurred by Luke’s diagnoses. While their medical insurance covers Luke and sister Madeline’s care, it does require that their family income must not exceed 200% of the federal poverty level. With the extraordinary amount of specialists, therapies, surgeries, and trips to Gainesville’s UF Shands to see Luke’s doctors and specialists, there is no way his family would be able to afford all of the necessities to keep him and Madeline thriving without extra assistance from Hang Tough and partners. Through the Hang Tough Foundation’s School Supply Drive, Luke’s parents Caroline and Jacob were able to prepare Luke (2nd grade) and little sister Madeline (Kindergarten) for the school year without ever stepping foot into a box store. Luke and Madeline are off to a great start and their parents can rest easy knowing her children have the exact school supplies as their peers

Priority Area: Success in School & Life

Investment Total: \$824,678.31

Families Served: 2,093 (+502)

FUNDED ENTITY	TOTAL Awarded	TOTAL Expended	FAMILIES Projected/Served		SUMMARY
Achieve Academy	\$20,000.00	\$20,000.00	20	18	Expand summer programming available for 20 students with special needs
Boys & Girls Clubs of the Big Bend	\$52,470.17	\$52,471.17	65	40	Expand summer programming to approximately 40 youth displaced by closure of Orange Ave Community Center
Choice Impact Community Development Corporation	\$42,643.76	\$40,462.99	70	60	Expand summer ARTS program available to approximately 70 additional elementary aged youth
Creative Mind Solutions, Inc.	\$60,848.00	\$60,848.00	30	79	Expand literacy and STEM focused summer programming available to an additional 30 PK-3rd grade youth and enhancing curriculum of existing 25 students; includes support for the purchase of van to overcome transportation barriers
Divine Revelations Ministries, Inc. (DRMI)	\$15,793.76	\$15,793.76	20	52	Expand the Geeks and Gramps Program to reach approximately 20 more youth in its intergenerational technology-based program that bridges the digital and generational divide by pairing youth with seniors to learn and teach basic and emerging technologies
Dream Builders Greatness Center	\$21,180.00	\$19,380.00	75	76	Expand summer programming available to 75-100 youth in targeted zip codes, ages 5-13
Killearn Sunshine Academy	\$44,380.00	\$44,380.00	200	52	Expand summer programming available to approximately 200 additional youth from targeting zip codes
LeMoyne Art Foundation Inc. d.b.a. LeMoyne Arts	\$4,000.00	\$4,000.00	10	11	Expand summer ARTS program available to 10 additional youth

Leon County Schools' 21st Century Community Learning Centers (21st CCLC)	\$139,004.25	\$97,175.38	540	1,283	Expand the number of available 21st CCLC summer program seats to 540 additional students in nine Title 1 schools, elementary through high school, AND expand time for all participants (662+540)
Omega Lamplighters, Inc.	\$50,000.00	\$50,000.00	75	74	Expand summer programming available to approximately 75 youth (rising 3rd-12th grade) with a focus on academic skill development, holistic connections to services, and career and college readiness
Pace Center for Girls, Leon	\$46,000.00	\$45,081.52	70	58	Expand programming available to approximately 70 Pace Girls, aged 11-17, for the entire summer plus the addition of parent workshops to better connect families to mental health services, legal services and workforce development opportunities
Pivotal Point Enterprises, Inc.	\$42,794.00	\$42,132.52	75	101	Expand two summer programs at six different schools to serve approximately 75 youth with a social-emotional focus; includes support for the purchase of iPads to improve data collection
ReThink Energy Florida, Inc.	\$7,047.75	\$6,964.71	30	69	Expand summer STEM program available to an additional 30 youth
STEMS4GIRLS, INC.	\$8,400.00	\$8,202.32	10	21	Expand summer STEM program available to an additional 10 youth
TeenPreneur Foundation, Inc.	\$91,576.45	\$91,262.70	60	38	Expand summer programming available to approximately 60 youth in high juvenile crime neighborhoods; includes funding to add a food distribution component to the program and support to purchase vans to help students overcome transportation barriers
Young Engineers Tallahassee	\$178,540.17	\$178,899.20	50	61	Expand STEM program into the summer to serve 50 youth (3rd - 8th grade) from targeted neighborhoods

Priority Area: Healthy Children, Youth & Families

Investment Total: \$211,163.86

Families Served: 1,171 (+242)

FUNDED ENTITY	TOTAL Awarded	TOTAL Expended	FAMILIES Projected/Served		SUMMARY
2-1-1 Big Bend, Inc.	\$43,195.15	\$43,195.15	175	723	Expand available funds to support an additional 150 Lyft customers to overcome transportation barriers to access mental health and food stability resources; includes a staff position to expand and update the resource database specific to mental health services
Divine Healthcare Consulting, LLC dba SG Mental Health Counseling	\$93,691.59	\$95,479.98	54	422	Expand the availability of mental health services available to at least 54 additional youth and families participating in existing summer camps
Oasis Center for Women & Girls, Inc.	\$67,523.81	\$66,732.90	20	16	Expand the reach of the Soul Sisters programs to at least 15 additional mothers, including providing access to vital community resources and mental health services; includes support for the purchase of a van to help program participants overcome transportation barriers
Turn About, Inc. of Tallahassee	\$6,753.32	\$4,763.74	60	10	Expand availability of mental health services to approximately 60 youth participating in existing summer camps and their families, as needed

Priority Area: Stable and Nurturing Families & Community

Investment Total: \$529, 639.51

Families Served: 30,815 (+82,641)

FUNDED ENTITY	TOTAL Awarded	TOTAL Expended	FAMILIES Projected/Served		SUMMARY
Alternative Resources & Technical Services, Inc. (ARTS, Inc.)	\$61,032.80	\$60,008.90	180	201	Provide parent education to support school success including kindergarten readiness (65 incoming kindergarteners), attendance (85 K-5th graders) and connection to community resources (30 families)
ASPIRE Capital Region (Greater Tallahassee Chamber of Commerce)	\$18,687.22	\$14,413.45	75	78	Expansion of FAFSA/Career Planning workshops and listening sessions hosted by ASPIRE with 5 groups of high needs/at-risk high school youth and their parents/caregivers, serving approximately 75 youth
Big Bend Homeless Coalition	\$35,588.99	\$35,588.99	24	82	Addition of case manager to apply diversion techniques to HOPE community clients plus direct assistance for up to 24 families
Greater Tallahassee Chamber of Commerce (Talent Hub)	\$92,010.00	\$92,126.93	5,184	458	Expand the capacity of Talent Hub to better meet the needs of youth, ages 12-24, connect to college and career readiness opportunities including the more than 5,000 youth already active on TalentHub; includes a staff consultant to manage the growth of TalentHub to be laser focused on supporting articulated youth development goals
Hang Tough Foundation	\$2,500.00	\$3,650.83	75	225	Better equip approximately 75 struggling families with ample school supplies
Legal Services of North Florida, Inc.	\$19,611.00	\$19,358.39	20	13	Expand access to legal services available for at least 20 families through community referrals and educational workshops

Mount Olive Affordable Housing and Community Development Corporation	\$150,000.00	\$153,025.83	50	67	Intergenerational skill development classes for at least 50 families, direct financial assistance for up to 30 families, and full-time community navigation services for families through two community partners for up to another 150 families
Second Harvest of the Big Bend, Inc.	\$122,709.50	\$122,709.50	3,600	12,410 + 17,179	Expand provision of food distribution to the promise zone zip codes impacting approximately 1,200 unduplicated children and youth per month; establish new distribution partners/sites
Survive and Thrive Advocacy Center, Inc.	\$27,500.00	\$26,565.94	100	102	Provide direct education and support to residents at HOPE community and a handful of community programs to better support those who have been sex and labor trafficked, to help prevent further or initial victimization, and to inform and empower individuals to recognize and safely respond to human trafficking situations; this will include a general education campaign for the entire community, complete with toolkit for community partners.



Children's Services Council of Leon County

Listening Session Guidance

CSC Leon Council Members will participate in one or more of the scheduled Listening Session, at which Leon County citizens will have the opportunity to provide input directly to CSC Leon staff and Council Members in attendance. The following guidance will govern these community meetings to allow for optimum participation and compliance with Government-in-the-Sunshine laws.

Prior to the events:

- Council Members will be asked to confirm participation by adding the appropriate Outlook™ invitation to their calendars (ref: email sent 12/30/22).
- As there will be one or more Council Member present at each event, all Listening Sessions will be publicly noticed, listing the Council Members who have confirmed participation.
 - If a Council Member determines they cannot attend an event, they will let CSC Staff know and their absence will be announced; conversely, if a Council Member determines they can attend, they will let CSC Staff know as soon as possible so that it can be announced prior to the start of the event.
- EventBrite™ will be used to confirm community members' participation and to help ensure proper social distancing at each meeting, where possible; Council Members **DO NOT** need to use EventBrite™ to register.

At the events:

- Council Members are to arrive and immediately find a CSC staff person, who will direct them to their seat.
 - Council Members should not congregate prior to the event.
- The event will be moderated by a facilitator to ensure the following:
 - All comments by all in attendance are heard by everyone; where available, microphones will be used and managed by CSC Staff.
 - The audience is aware of Council Members' presence (introducing Council Members).
 - The audience understands that Council Members are present to primarily listen and observe; however, follow-up questions or clarification on a comment can be asked by a Council Member and an answer provided.
 - Remind the participants that this is considered a public meeting in compliance with the Laws of Florida, therefore the public should refrain from having individual conversations with Council Members directly (basically one-on-one conversations),
- CSC Staff will be taking notes to ensure that if there is a follow-up needed after the event, staff can do that.

When the event concludes:

- The facilitator will note when the event is about to conclude.
- Before the participants are dismissed, Council Members will be allowed to exit the building.
 - Council Members should not congregate nor communicate with each other following the event.
- Participants will then be dismissed with assistance from CSC Staff.

Children's Services Council of Leon County

2002 Old St. Augustine Rd., Ste. A-50,
Tallahassee, FL 32301



Date	To	From
January 5, 2023	Dr. Zandra Glenn CSC Leon County Council Chair	Rob Renzi, Spokesperson CSC Leon County RFP Solicitation Committee

SUBJECT: Recommendation for Award for Financial Auditing Services

EXECUTIVE SUMMARY

Based on the findings below, the Financial Auditing Services Solicitation Committee hereby recommends that CSC Leon award the referenced contract to **Purvis Gray, Certified Public Accountant**, which the Committee has determined will provide the best value based on the criteria specified in the Request for Proposal entitled *Financial Auditing Services* ("RFP"). The contract price is **\$49,000** for the life of the contract.

BACKGROUND

On November 17, 2022, the CSC Leon governing council approved issuance of the RFP inviting responses from vendors interested in providing financial and compliance auditing services to CSC Leon. The RFP included a draft statement of work for an independent audit of three fiscal years, 2020-2023. Overall, the goal of the RFP was to select a single vendor that would provide the best value to CSC Leon for auditing services by persons or entities qualified to perform audits of independent special districts of the State of Florida.

CSC Leon issued the RFP on November 18, 2022. By December 16, 2022, CSC Leon received three Responses. The designated Solicitation Committee members (Luis Camejo, Danielle Fried, and Rob Renzi) independently evaluated the Responses in accordance with the following categories:

- Experience, Qualifications and References: 20 pts
- Proposed Pricing: 30 pts

On January 5, 2023, the Committee met publicly to review their collective scores and formulate by consensus a recommendation of Contract award that will provide best value to CSC Leon.

The Committee unanimously decided to recommend Purvis Gray based on the following:

- The experience of the Respondent clearly demonstrates expertise in the provision of auditing services to include rendering services to other independent special districts in the State of Florida.
- The proposed pricing from the Respondent was the only proposal that included a significant lower cost for the first year, reflecting the true scope of work described within the RFP.
- The Respondent earned above average scores in both categories with an 86.7% in Experience, Qualifications and References and a 90.0% in Proposed Pricing. Their overall total score was 88.7%.
- CSC Leon conducted a thorough and transparent competitive procurement process.

In consideration of the above, we respectfully recommend award of this contract to Purvis Gray, the best value response to the RFP with a contract amount of \$49,000 for the life of the contract.

Respectfully,

Rob Renzi, Spokesperson
Children's Services Council of Leon County
RFP Solicitation Committee

Date

CONTRACT FOR CAPACITY BUILDING SERVICES

THIS CONTRACT (the “Contract”) is between the Children’s Services Council of Leon County (“CSC Leon”), an independent special district, and the United Partners for Human Services, (“Contractor”), the lead agency for a joint collaborative with the Institute for Nonprofit Innovation and Excellence; each individually a “Party” and collectively the “Parties”.

WHEREAS, the Contractor responded to CSC Leon’s competitive solicitation entitled *Invitation to Negotiate (ITN) Capacity Building Services*; and,

WHEREAS, CSC Leon has relied on the Contractor's response, and explanations, demonstrations, and revisions thereof, to determine that the Contractor’s offer provides the best value to CSC Leon; and,

WHEREAS, the Parties desire to enter into the Contract pursuant to which the Contractor will provide the services hereafter described.

NOW THEREFORE, in consideration of the premises set forth herein, the Parties agree as follows:

1. The Contractor shall perform the services described in the Statement of Work attached as Exhibit 1, and subject to the Contract terms and conditions (the “Services”).

2. This is a fixed price Contract. In exchange for acceptable performance of the Services, CSC Leon agrees to pay, and Contractor agrees to accept, the fixed price of **\$288,452.55**. The Contract price is all-inclusive, and CSC Leon will not compensate or reimburse the Contractor any other amounts related to Contract performance such as travel expenses, license fees, taxes, miscellaneous expenses, overhead, etc. CSC Leon will pay the Contractor in arrears the price agreed to for each Contract payment milestone identified in Exhibit 1. CSC Leon will not pay the Contractor any more than the Contract price in exchange for performing the Services. If it becomes necessary for CSC Leon to request the Contractor to render any additional services, either to supplement the Services or to perform additional work related to the Project, then the Parties will execute an amendment to the Contract. Such additional work shall not be performed unless set forth in an amendment. CSC Leon shall not be obligated to pay or reimburse the Contractor more than the amount obligated pursuant to the Contract including amendments.

3. The Contract effective date shall be February 1, 2023 or the date on which the last Party has signed the Contract, whichever is later (the “Effective Date”). The Contract term shall begin on the Effective Date and shall end on September 30, 2024, unless the Contract is terminated earlier or renewed as provided herein. CSC Leon’s shall not be obligated to pay for costs incurred related to the Contract prior to its Effective Date or after its ending date.

4. The Contract term may, upon mutual agreement, be extended for a period no longer than the term of the original Contract, if the Contractor's performance of the Services is delayed by causes outside the reasonable control of the Contractor. A Contract time extension is the sole remedy for delays. Because the Contract is for performance of specific Services, it will not be renewed.

5. The Parties' contact information for all purposes related to this Contract is:

CSC Leon

Dina Snider
dsnider@cscleon.org
PO Box 1816
Tallahassee, FL 32302
(850) 764-2966

Contractor

Amber R. Tynan
amber@uphsfl.org
2477 Tim Gamble Place, Suite 200
Tallahassee, FL 32308
(850) 270-5259

Contractor

Kim Grippa
executivedirector@myinie.org
300 W. Pensacola Street
Tallahassee, FL 32301
(850) 201-9766

A Party may designate a different contact person after the Effective Date of the Contract by providing written notice of the change to the other Party's contact, without amendment of the Contract.

6. The Contractor warrants that its Services will be performed in a good and workmanlike manner, in accordance with the Contract, and that deliverables will materially comply with their applicable requirements. The Contractor will re-perform any work not materially in compliance with this warranty which is brought to its attention within 90 days after the work has been performed. Failure to re-perform the work in a manner materially compliant with their applicable requirements may be considered by CSC Leon to be a material breach of the Contract.

7. CSC Leon is an agency subject to Florida's public records laws. In performing the Services, the Contractor is acting on behalf of CSC Leon as provided under section 119.011(2), Florida Statutes. Accordingly, the Contractor shall:

- (a) Keep and maintain public records required by CSC Leon to perform the Services.
- (b) Upon request from CSC Leon's custodian of public records, provide CSC Leon with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided by Florida law.
- (c) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the contractor does not transfer the records to the public agency.
- (d) Upon completion of the Contract, transfer, at no cost, to CSC Leon all public records in possession of the Contractor or keep and maintain public records required by CSC Leon to perform the Services. If the Contractor transfers all public records to CSC Leon upon completion of the Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of the Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to CSC Leon, upon request from CSC Leon's custodian of public records, in a format that is compatible with the information technology systems of CSC Leon.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 850-7644-2966 OR INFO@CSCLEON.ORG.

8. CSC Leon may unilaterally cancel the Contract for refusal by the Contractor to allow public access to all documents, papers, letters, or other material made or received by the Contractor in conjunction with the Contract, unless the records are exempt from section 24(a) of Article I of the State Constitution and section 119.07(1), Florida Statutes.

9. To preserve the public interest in the prudent expenditure of public funds, CSC Leon is authorized to inspect (a) financial records, papers, and documents of the Contractor that are directly related to the performance of the Contract or the expenditure of public funds; and (b) programmatic records, papers, and documents of the Contractor which CSC Leon determines are necessary to monitor the performance of the Contract or to ensure that the terms of the Contract are being met. The Contractor shall provide such records, papers, and documents requested by CSC Leon within 10 business days after the request is made.

10. The Contractor shall not divulge to third parties any confidential information obtained by the Contractor or its agents, subcontractors, officers or employees in the course of performing the Services, including, but not limited to, protected health information as defined

in 45 CFR Part 160, personally identifiable information as defined in *HHS Policy for Preparing for and Responding to a Breach of Personally Identifiable Information (PII)* (version 2.0), Doc. No. HHS-OCIO-PIM-2020-05-003, or personal information as defined in section 501.171(1), Florida Statutes (2021). The Contractor shall not be required to keep confidential information or material that is publicly available through no fault of the Contractor, or material that is otherwise obtainable under Florida law as a public record. To insure confidentiality, the Contractor shall take appropriate steps as to its personnel, agents, and subcontractors. The warranties of this paragraph shall survive the Contract.

11. In performing the Services, the Contractor and any subcontractor shall comply with the Florida Cybersecurity Standards promulgated in chapter 60GG-2 of the Florida Administrative Code, *Information Technology Security*.

12. All Services will be performed within the continental United States. All data related to or arising from the Contractor's performance of the Services shall remain in, and be maintained in, the continental United States. Neither the Contractor nor any subcontractor shall access such data from outside of the continental United States, nor will they send any such data outside the continental United States. For purposes of this requirement, "data" means a subset of structured information in a format that allows such information to be electronically retrieved and transmitted.

13. CSC Leon is a public employer as defined in section 448.095, Florida Statutes. Therefore, the Contractor shall register with and use the E-Verify system to verify the work authorization status of all newly hired employees (see <https://www.e-verify.gov/>). Any subcontractors engaged by the Contractor to provide Services for work on the Contract must provide the Contractor with an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien and the Contractor shall maintain a copy of such affidavit for the duration of the Contract.

14. The Contractor agrees to indemnify, defend and hold harmless CSC Leon, its current and future Council members, officers, employees, agents, representatives, successors and assigns (the "CSC Leon Indemnitees") from and against any and all claims, damages, liabilities, losses, costs or suits, of any nature whatsoever arising out of, or due to any acts or omissions of the Grantee, its delegates, employees and agents, arising out of or under this Agreement, including reasonable attorney's fees.

15. This Contract shall be governed by the laws of the State of Florida without regard to its conflict of laws provision. The exclusive venue for any lawsuits, actions or proceedings arising in connection with this Contract shall be the state courts of Leon County, Florida; in any such action Florida law will apply, the Parties waive any right to jury trial, and the prevailing Party is entitled to recovery of reasonable attorneys' fees.

16. If any provision of this Contract is held to be invalid or unenforceable by a court of competent jurisdiction, such holding shall not affect the validity of the remaining provisions,

it being the intention of the Parties that this Contract be so construed as to render enforceable that portion of this Contract unaffected by such holding. The contractual provisions shall be deemed severable.

17. CSC Leon may terminate the Contract if the Contractor fails to (1) maintain adequate progress, thus endangering timely performance of the Contract, (2) honor any material term of the Contract, or (3) abide by any material legal requirement. Before exercising its right to terminate, CSC Leon will provide the Contractor at least ten days written notice and opportunity to cure.

18. If either Party shall be delayed or hindered in, or prevented from, the performance of any act required hereunder by reason of strikes, lock-outs, labor troubles, inability to procure materials, failure of power, riots, insurrection, adverse weather conditions (including but not limited to tropical storms and hurricanes), epidemic or pandemic, war or other reasons of a like nature not the fault of the Party delayed (all of such reasons or causes referred to as "Force Majeure"), then performance of such acts shall be excused for the period of the delay, and the period within which the performance of such act may be required hereunder shall be extended by a period equivalent to the period of such delay. The exclusive relief for a Force Majeure event will be receipt of an extension of the schedule for the performance of the Services or other act required under the Contract.

19. The parties will comply with all applicable health and safety laws, rules, regulations, and guidelines. In the case of conflict among federal, state, and local recommendations, the parties will follow the most stringent recommendations. If Services are required at a site at which the most stringent recommendations are not followed, the parties will negotiate in good faith concerning alternative means of Service delivery, which may include transition to virtual means of delivery. The parties may also agree to alternative virtual Service delivery in the event that pandemic conditions rise to the level of a Force Majeure event.

20. The relationship between CSC Leon and the Contractor is that of customer and service provider, and nothing contained in this Contract shall be deemed or construed as creating the relationship of principal and agent, or of partnership, or of a joint venture between CSC Leon and the Contractor in respect to the Services or otherwise.

21. The Contractor shall take all actions necessary to ensure that the Contractor's employees, subcontractors and other agents are not employees of CSC Leon. Such actions include, but are not limited to, ensuring that the Contractor's employees, subcontractors, and other agents receive benefits and necessary insurance (health, workers' compensation, and unemployment) from an employer other than CSC Leon.

22. The Contractor shall not permit this Contract or any of its obligations or rights hereunder to be delegated or assigned voluntarily, involuntarily or by operation of law, without the express prior written authorization of CSC Leon at its sole and absolute discretion. No such written authorization, however, shall be construed as discharging or releasing the Contractor

from the fulfillment of obligations under this Contract. This Contract shall inure to the benefit of and bind the Parties and their permitted successors and permitted assigns.

23. The execution and performance of this Contract by each Party has been duly authorized by all applicable laws and regulations and all necessary corporate action, and this Contract constitutes the valid and binding obligation of such Party, enforceable in accordance with its terms.

24. The Contractor warrants that, to the best of its knowledge, there is no pending or threatened action, proceeding, or investigation, or any other legal or financial condition, that would in any way prohibit, restrain, or diminish the Contractor's ability to satisfy its Contract obligations. The Contractor warrants that neither it nor any affiliate is currently on the convicted vendor list maintained pursuant to section 287.133, Florida Statutes, or on any similar list maintained by any other state or the federal government. The Contractor shall immediately notify the CSC Leon in writing if its ability to perform is compromised in any manner during the term of the Contract.

25. CSC Leon and the Contractor are the exclusive Parties to this Contract, and no other individual or entity is intended to have, nor shall any individual or entity be deemed to have, any rights, benefits, privileges, causes of action, rights of action or remedies as a third-party beneficiary to or under this Contract or otherwise.

26. This Contract and any amendment made in accordance with the terms hereof may be executed in any number of counterparts, each of which shall be an original, but all of which together shall constitute one and the same instrument.

27. Every one of the rights, remedies, and benefits provided by this Contract shall be cumulative and shall not be exclusive of any other such rights, remedies, and benefits allowed by law.

28. Failure by either Party to enforce any of the provisions hereof for any length of time shall not be deemed a waiver of its rights set forth in this Contract. Such a waiver may be made only by an instrument in writing signed by the Party sought to be charged with the waiver.

29. This Contract (including exhibits) contains all the agreements of the Parties with respect to the subject matter herein. There have been no representations made by either Party or understandings made between the Parties express or implied with respect to the subject matter hereof other than those set forth in this Contract. This Contract may not be modified except by a written instrument duly executed by the Parties. The Parties have had an opportunity negotiate this Contract and to consult with counsel; accordingly, the rule of interpretation known as "construction against the drafter" will not apply to this Contract.

IN WITNESS WHEREOF, each Party has caused this Contract to be executed by its duly authorized representatives.

CHILDREN’S SERVICES COUNCIL OF LEON COUNTY

By:

Its:

Date: January ___, 2023

UNITED PARTNERS FOR HUMAN SERVICES

By:

Its:

Date: January ___, 2023

INSTITUTE FOR NONPROFIT INNOVATION AND EXCELLENCE

By:

Its:

Date: January ___, 2023

EXHIBIT 1 – STATEMENT OF WORK

A. Purpose

As CSC Leon establishes guidelines and requirements for each of its community funding opportunities, the Contractor will work alongside CSC Leon to ensure all investments lead to high-quality services available to children, youth and families. To this end, the Contractor will provide ongoing assessment, training and technical assistance to children's services providers to increase their ability to more competitively respond to CSC Leon funding applications.

Specifically, the Contractor will:

1. Provide technical assistance to community providers seeking to apply for CSC Leon funding.
 - a. Develop and implement a technical assistance plan customized to each unique community funding opportunity released by CSC Leon.
 - b. Technical assistance will be inclusive of all required elements in the RFA process (e.g., organizational chart, theory of change, data collection methods, budgeting).
2. Develop a Community of Practice (CoP) with organizations not funded in each cycle to provide support in preparation for the next funding cycle application.

B. Definitions

1. **at hope:** referring to neighborhoods or community population that have historically been underserved or under resourced
2. **"readiness" of applications:** referring to the preparedness of a grant seeker to have the knowledge, skill set and support to successfully write a high-quality service proposal with all required elements
3. **technical assistance plan:** a tool to outline, track and report targeted support to an organization with a need or problem; an effective method for building the capacity of an organization.
4. **after-action report:** a detailed critical summary or analysis of a past event or activity, created to re-assess decisions and consider possible alternatives for future scenarios.

C. Service Descriptions

1. Service Line 1: Technical Assistance for Grant Seekers

The Contractor will ensure any organization seeking to apply for CSC Leon funding has adequate support.

These activities will include, but are not limited to:

- Conducting an assessment of potential applicants to identify strengths and challenges in the application process.

- Developing and implementing a TA plan customized to each unique community funding opportunity released by CSC Leon, that will include at least three trainings per RFA.
 - TA will be inclusive of all required elements in the RFA process (e.g., organizational chart, theory of change, data collection methods, budgeting, etc.).
- Maintaining documentation of technical assistance requests, services provided, and progress made.

The Contractor will ensure that all potential providers of services to children, youth, and families are prepared to competitively respond to and meet the expectations of each community funding opportunity released by CSC Leon. The primary objective is to level the playing field so that an equitable, inclusive, and collaborative process ensues.

The Contractor will customize plans to each unique community funding opportunity to include Summer 2023, Priority Funding Cycle 1, Other Funding Cycle 2, Priority Funding Cycle 2, and Summer 2024.

The Contractor is in Tallahassee; therefore, offices and staff are easily accessible and readily known to most, if not all, potential service providers. This familiarity will encourage potential service providers to attend the scheduled in-person and virtual training sessions and make it easy to drop by the offices whenever additional one-on-one assistance is needed.

The process will be divided into four (4) phases as follows:



a. Timing and Sequencing

Phase 1: The Pre-Application Phase will begin immediately after each funding announcement. There are two goals of this phase:

1. Ensure all potential service providers (“applicants”) understand the eligibility requirements, what is required for a complete and timely application, the accountability and data required for the provision and reporting of deliverables, and the roles of the Contractor in the process. ***The training will be virtual.***
2. Establish a baseline of the strengths and challenges of the applicants and identify the neighborhoods in which services are being proposed.

- a. An Assessment Report will be prepared that will inform the substance of the technical training provided in subsequent phases and identify whether additional outreach is needed to applicants proposing services in “at hope” neighborhoods.

Phase 2: The Supplemental Phase will begin approximately three weeks after the Pre-Application Phase. The goals of this phase are to (1) specifically address challenges identified in the Assessment Report and (2) catch-up new training attendees, if any, after direct outreach to applicants proposing services in “at hope” neighborhoods. ***The training will be in-person.***

Phase 3: The Application Phase will start approximately a month prior to the application deadline. The goals of this phase are to (1) continue to assist with all topics addressed in the Pre-Application and Supplemental Phases and (2) ensure all applicants understand and can meet the technical requirements of application submission. ***The training will be virtual.***

Phase 4: The Post Application Phase will start immediately after funds are awarded. The goals of this phase are to (1) reinforce the importance of accountability in the provision and reporting of deliverables and (2) provide refreshers on post award reporting requirements. In addition, applicants not funded will be referred to the Communities of Practice for Unselected Applicants (outlined in more detail in Tab D, Service Line 2 response). ***The training will be virtual.***

The four phases will translate into four trainings per funding cycle. All trainings will be open to all applicants. All online trainings will be recorded and available throughout the application process on the UPHS and INIE websites. An “FAQ” document will be continually updated throughout the application process and available on both websites as well. UPHS and INIE will maintain documentation of technical assistance requests, services provided, and progress made.

CSC Leon Summer 2023 Funding Cycle

Funding Cycle	Pre-Application Phase	Supplemental Phase	Application Phase	Post Application Phase
February – May 2023	Early February 2023	Late February 2023	Early March 2023	May 2023

TA Plan Delivered: February 10, 2023

Wrap-up Report Delivered: June 1, 2023

CSC Leon Priority Funding Cycle 1 (Family Supports)

Funding Cycle	Pre-Application Phase	Supplemental Phase	Application Phase	Post Application Phase
March – August 2023	Late March 2023	April 2023	Late April 2023	August 2023

TA Plan Delivered: March 1, 2023

Wrap-up Report Delivered: August 15, 2023

CSC Leon Summer 2024 Funding Cycle

Funding Cycle	Pre-Application Phase	Supplemental Phase	Application Phase	Post Application Phase
December 2023 – May 2024	December 2024	Early January 2024	Late January 2024	April 2024

TA Plan Delivered: November 1, 2023

Wrap-up Report Delivered: May 1, 2024

CSC Leon Priority Funding Cycle 2 (Prenatal/Postnatal)

Funding Cycle	Pre-Application Phase	Supplemental Phase	Application Phase	Post Application Phase
January–October 2024	January 2024	Early February 2024	Late February 2024	June 2024

TA Plan Delivered: December 1, 2023

Wrap-up Report Delivered: June 30, 2024

b. Ensuring Equitable and Inclusive Community Engagement

As previously stated, the Contractor will ensure that all potential providers of services to children, youth, and families are prepared to competitively respond to and meet the expectations of each community funding opportunity released by CSC Leon. The objective is an equitable, inclusive, and collaborative process. To ensure full participation of all potential applicants, our organizations will work with CSC Leon to ensure that messaging is included in each notice of funding cycle and provide direct communications as well.

The Assessment Report will detail whether additional outreach is needed to applicants proposing services in “at hope” neighborhoods. If yes, then direct outreach to potential applicants will be conducted through phone calls and emails by the Contractor.

The Contractor has a thorough understanding of the nonprofit sector based on its membership in terms of types of services offered and geographic areas of service, especially among those providing services in the three domains of CSC Leon: Success in School and Life, Healthy Children, Youth, and Families, and Stable and Nurturing Families and Community.

UPHS and INIE Membership Demographic Breakdown by CSC Leon Domain Focus (as of November 2022)

Membership Type	UPHS	INIE	Children and Family Serving Organizations	
Under \$100,000 annual operating budget (inclusive of grassroots, volunteer-led organizations)	61%	43%	UPHS	INIE
\$100,000 - \$500,000 annual operating budget	12%	26%	67%	40%

\$500,000 - \$1M annual operating budget	11%	10%		
Over \$1M annual operating budget	16%	21%		

Due to most of its members being smaller in size, the Contractor has responded by successfully crafting its programs and services to meet the needs of resource-limited nonprofits looking to build capacity and struggling to compete with larger, well-established organizations.

c. **Sample Training Topics and Descriptions**

- ***CSC Leon Eligibility Requirements Overview***
 - New Agencies
 - Previously Funded Agencies
- ***Review of RFA Required Elements***
 - Includes organizational chart, theory of change, data collection methods, budgeting, etc.
 - Identifying one's capacity to deliver services.
- ***Overview of Reporting Requirements***
- ***Contract Management Workshop***

d. **Methods of data collection and analysis to show increase in readiness**

The Contractor will employ a Pre-Application/Post-Application survey data collection method to assess outcomes and impact.

The Contractor will require that a Pre-Application Self-Assessment Form be completed.

Applicants will answer the following questions:

1. Have you ever applied for CSC funding?
2. If yes, did you receive funding?
3. If you did not receive funding, what would have helped you navigate the application process?
4. In what geographical area of Leon County by zip code(s) are you proposing to provide services?

The Pre-Application Self-Assessment Form will also evaluate applicants' understanding of their strengths and weaknesses across the requirements of the CSC Leon funding opportunity. Likert-type scales and open-response questions will be used to quantify responses. The data will be aggregated in the Assessment Report.

Applicants will later in the process assess their comfort with their completed/submitted applications by filling out the Post-Application Self-Assessment Form. This assessment will evaluate whether applicants made any changes to address the challenges they identified in their pre-application self-assessment. It will also assess the effectiveness of the role the Contractor played in helping applicants get to their level of readiness or comfort.

Aggregated self-assessment data (both pre and post application) will be compared to aggregated CSC Leon scoring rubric results to determine if the self-assessments align with CSC Leon scoring assessments.

e. Sample Technical Assistance Plan

Data Collected at Registration for Each Training Session: Name, Organization, Title, Email Address, and Phone Number.

➤ **Pre-Application**

Part One

To register for the Zoom training, applicants will be required to complete the Pre-Application Self-Assessment Form.

Part Two

Zoom Webinar 1:00 p.m. – 3:00 p.m.

Applicants will be provided:

- (1) An overview of the CSC Leon Eligibility Requirements; (2) a review of the RFA Required Elements (e.g., organizational chart, theory of change, data collection methods, budgeting, etc.); (3) methods to identify one's capacity to deliver services; and (4) an explanation of the role of the Contractor in the process.

Part Three

An open question and answer period.

*Answers provided on the Pre-Application Self-Assessment Form will be analyzed to (1) form the baseline of applicants' strengths and challenges for the Assessment Report; (2) identify areas that will need additional focus in the subsequent trainings; and (3) identify whether additional outreach is needed to applicants proposing services in "at hope" neighborhoods.

➤ **Supplemental Phase**

Part One

To register for the in-person training, applicants will be required to answer the following questions:

- (1) Did you attend the first training on x date? If no, applicants will be required to complete the Pre-Application Self-Assessment Form. The additional data, if any, will be added to the Assessment Report.

Part Two

In-Person Training at the Contractor Offices, 1:00 p.m. – 3:00 p.m.

Applicants will be provided:

- (1) An overview of the CSC Leon Eligibility Requirements; (2) a review of the RFA Required Elements (e.g., organizational chart, theory of change, data collection

methods, budgeting, etc.); (3) methods to identify one's capacity to deliver services.; and (4) an explanation of the role of the Contractor in the process.

Part Three

Topics identified as challenges in the aggregated Assessment Report will be addressed. Hands-on assistance will be provided.

Part Four

An open question and answer period.

➤ **Application Phase**

Part One

Zoom Webinar 1:00 p.m. – 3:00 p.m.

Applicants will be provided:

- (1) An "Overview of Reporting Requirements"
- (2) A review of all the essential components of the application and the technical requirements for submitting the application.

Part Two

An open question and answer period.

➤ **Post-Application Phase**

Part One

To register for the Zoom training, applicants will be required to complete the Post-Application Self-Assessment Form.

Part Two

Zoom Webinar 1:00 p.m. – 3:00 p.m.

Applicants will be provided:

- (1) A "Contract Management" Workshop to ensure program delivery and outcomes align with feasibility based on funding and ensure reporting is adequate and aligned with deliverables identified in the funding contract.

Part Three

An open question and answer period.

f. Sample Outline for After-Action Report

Step One

Unfunded applicants will be directly and immediately referred to the CoP.

Step Two

To analyze the success of the technical assistance plan and identify areas needing revision in future funding cycles, the following data will be analyzed and reported in the Wrap-up Reports:

- (1) Self-assessment data (both pre and post application) for unfunded applicants will be compared to CSC Leon scoring assessments to determine alignment.
- (2) Challenges identified by the Contractor in the Assessment Report will be compared to CSC Leon scoring assessments of unfunded applicants to determine alignment.
- (3) Attendance records per training session for each applicant will be gathered to determine if funded applicants had a higher attendance rate than unfunded applicants.
- (4) Attendance records will be analyzed further to assess the number of sessions attended by applicants proposing services in “at hope” neighborhoods. This data will be compared to direct outreach efforts to determine their efficacy.

Step Three

Data revealed in each Quarterly Report will be assessed and factored into the technical assistance plan for the next funding cycle.

g. Recruitment and Defining Success

- 100% of potential applicants will be notified via email, if possible, of the technical assistance plan details after each funding announcement.
- 60% of directly contacted applicants will attend 75% of the training sessions.

2. Service Line 2: Communities of Practice for Unselected Applicants

The Contractor will ensure any organization that is not funded has adequate and customized support for any future CSC Funding Opportunities.

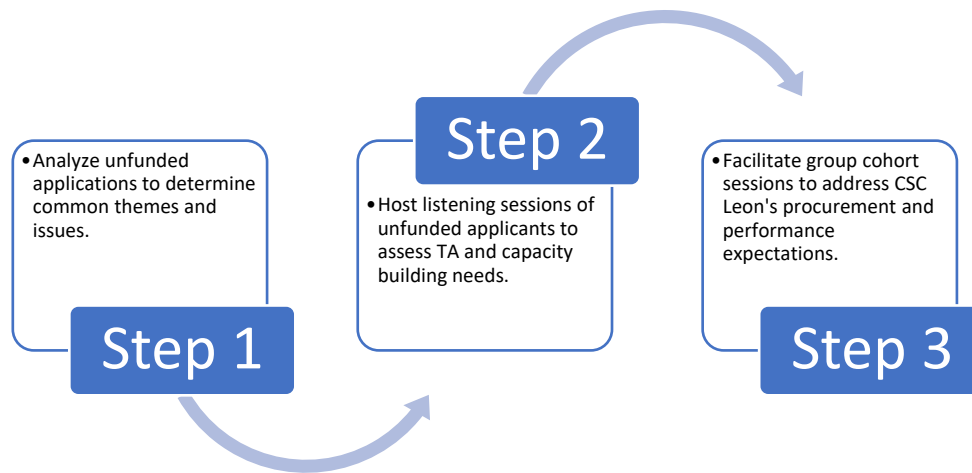
These activities will include, but are not limited to:

- Analysis of applications not selected for funding after each award cycle to determine common themes or issues.
- One-on-one and group cohort listening sessions of those not selected to determine necessary training and technical assistance supports.
- Group cohort training sessions addressing CSC Leon’s procurement and performance expectations.
- One-on-one coaching sessions to help develop, implement, or enhance business best practices to meet CSC Leon’s procurement and performance expectations.
- Provide quarterly reports to CSC Leon demonstrating knowledge acquisition and service satisfaction by CoP participants.

The Contractor will use a two-prong approach with unfunded applicants comprised of four (4) different cohorts with the focus to:

- Garner better understanding of the common themes and issues of unfunded applicants,
- Implement targeted and tailored capacity building plans for unfunded applicants to achieve greater success with future CSC Leon Funding Opportunities.

Group-Focused CoP Approach (Cohorts 1-4)



The Group-Focused CoP Approach will be centered around connection, sharing of ideas, and leveraging the experiences of all participants to achieve success in future CSC Leon funding opportunities. The group approach will allow participants to learn from one another based on the identification of common themes and challenges with the previous CSC Leon funding opportunity in which participants were not funded. Together, participants will discuss and problem-solve ways to enhance their capacities to compete for future funding, while garnering resources and support from other participants of the cohort.

Agency-Focused CoP Approach (Cohorts 1-4)



The Agency-Focused CoP Approach will be centered around implementation, evaluation, and analysis of each individual agency's needs to enhance its capacity to achieve success in future CSC Leon funding opportunities. The Agency-Focused CoP Approach will allow participants to work one-on-one with a dedicated staff person to fully analyze its current capacity (i.e. completion of UPHS Capacity Building Benchmarking Assessment), as well as areas for greater emphasis and focus through a customized training plan. To ensure ownership of enhancing one's capacity and commitment to the process, each agency engaged in the Agency-Focused CoP Approach will be required to sign a commitment form designating their intent to actively work toward the training plan established. This CoP Approach and model only works when participants show up and are actively engaged in the process. Together, each agency and Contractor staff will work to bridge knowledge gaps and improve skills, while also implementing infrastructure supports and best practices to see enhancement in each agency's capacity (i.e. UPHS Capacity Building Assessment Progress Review and Competency Report completion) with the goal of successfully applying for future CSC Leon funding.

For a balanced workload and meaningful experience for participants, each cohort will be limited to a maximum of twenty (20) participants each cycle.

a. Timing and Sequencing

As outlined below and immediately following each funding cycle reward process, the Contractor will work collaboratively to begin our two-prong approach for each cohort (4 total) in establishing a CoP for unfunded applicants.

CSC Leon Summer 2023 Funding Cycle (Cohort #1)

Funding Cycle	Funding Cycle Decision	Group-Focused CoP Approach	Agency-Focused CoP Approach	Reports Delivered
February – May 2023	May 2023	May 2023	June, July, and August 2023	September 15, 2023

CSC Leon Priority Funding Cycle 1 (Cohort #2)

Funding Cycle	Funding Cycle Decision	Group-Focused CoP Approach	Agency-Focused CoP Approach	Reports Delivered
March – August 2023	July 2023	August 2023	September, November 2023	December 30, 2023

CSC Leon Summer 2024 Funding Cycle (Cohort #3)

Funding Cycle Prep	Funding Cycle Decisions	Group-Focused CoP Approach	Agency-Focused CoP Approach	Reports Delivered
December 2023 – May 2024	March 2024	April 2024	May, June and July 2024	August 15, 2024

CSC Leon Priority Funding Cycle 2 (Cohort #4)

Funding Cycle	Funding Cycle Decision	Group-Focused CoP Approach	Agency-Focused CoP Approach	Reports Delivered
January – October 2024	May 2024	June 2024	June, July, and August 2024	September 30, 2024

b. Ensuring Equitable and Inclusive Community Engagement

To ensure full participation of unfunded applicants for each funding cycle, the Contractor will work with CSC Leon to ensure the messaging is included in each organization's notice of non-funding, as well as direct communication from the organizations once funding announcements are made. As part of CSC Leon's commitment to ensuring every agency has adequate support and resources to successfully compete for future CSC Leon Funding, the Contractor will offer the following:

- Access to UPHS & INIE's CoP Network which includes:
 - One-on-one and group cohort listening sessions of those not selected to determine necessary training and technical assistance supports.
 - Group cohort training sessions addressing CSC Leon's procurement and performance expectations.
 - Capacity Building Benchmarking Assessment with Training Plan
 - One-on-one coaching sessions to help develop, implement, or enhance business best practices to meet CSC Leon's procurement and performance expectations.
 - Agency Competency Report completed prior to next CSC Leon Funding Opportunity.
- Annual membership to both UPHS and INIE (***both funded and unfunded applicants***) are available for an additional cost.
 - Inclusive of access to certificate programs offered by INIE are available for an additional cost.

c. Sample Coaching Schedule and Topics

The Contractor will use the results of the UPHS Capacity Building Benchmarking Assessment to tailor its coaching schedules and plans. The Assessment analyzes twelve (12) nonprofit management areas for better understanding one's organizational capacity. These areas include:

- Governance and Board Leadership
- Board Meeting Effectiveness
- Board Management of the Executive Director
- Organizational Planning and Evaluation
- Personnel Management
- Volunteer Management
- Financial Management

- Financial Condition
- Resource Development
- PR and Communications
- Program Management, Planning, and Evaluation
- Organizational Capacity

Based on the results of the assessment, a comprehensive training plan will be put into place to be implemented and worked on through the Agency-Focused CoP Approach. Additionally, cohort members would have access to UPHS and INIE workshops, trainings, and certificate programs to enhance their capacity in related identified areas of focus.

Additionally, and in the event any cohort participants would require non-litigation legal assistance as part of their capacity building efforts that would assist them in qualifying for, applying for, and/or improving their ability to receive funding from the CSC Leon, the Contractor will sub- contract with Legal Services of North Florida for up to ten (10) agencies over the 20-month contract period.

d. Methods of Data Collection, Tracking and Analysis

The Contractor will use the following methods for data collection:

- The UPHS Capacity Building Benchmarking Assessment
- Capacity Building Training and Coaching Plan
 - Capacity Building and Technical Assistance Tracking Form (by Month and activity)
- Capacity Building Assessment Review
- Agency Competency Report for Success in Future CSC Leon Funding

e. Sample Outline for Quarterly Reports

The quarterly reports will include the following:

- Report of participants who participated in Cohort.
- Analysis of common themes or issues of unfunded applications.
- Report of one-on-one and group cohort listening sessions conducted in that reporting period, including attendance and engagement.
- Report of completed Capacity Building Benchmarking Assessments and accompanying training plans.
- Report of one-on-one coaching sessions to help develop, implement, or enhance business best practices to meet CSC Leon's procurement and performance expectations, including attendance, commitment, and engagement.
- Report of completed Agency Competency Reports, and analysis of which Cohort participants are ready to apply for next CSC Leon funding opportunity.

f. Recruitment and Defining Success

- The Contractor will work with CSC Leon staff to identify all potential participants for the CoPs following each funding cycle. Priority will be given to those unfunded applicants that

score within 20% of the funding threshold (maximum 20 per cohort to ensure the efficacy of both the group and individual agency learning environments).

- Of those unfunded agencies that are invited and commit to participate, 100% will complete the UPHS Capacity Building Benchmarking Assessment, and receive a comprehensive Training and Coaching Plan.
- Of those who complete the Assessment and receive a Training and Coaching Plan, at least 75% will show improvement in areas identified for greater focus, and at least 25% will demonstrate readiness for re-applying for funding in the next immediate CSC Leon Funding Opportunity.

D. Budget & Personnel

While this project is a fee for services contract, the Contractor did provide a detailed budget on which the total contract amount is based. It is included as Attachment A to this Statement of Work.

To meet the expectations of the Contract, the Contractor will hire two (2) part-time staff employed by the Institute of Nonprofit Innovation and Excellence to oversee Service Line 1: Technical Assistance activities, and one (1) full-time Capacity Building Manager employed by United Partners for Human Services to oversee Service Line 2: Communities of Practice activities. Draft position descriptions are included as Attachment B to this Statement of Work.

The INIE Executive Director will have responsibilities in managing this contract for Service Line 1 specific to developing four technical assistance plans customized to meet the needs of four unique CSC Leon funding cycles. The plans will be tailored to the unique and specific needs of CSC Leon. The Executive Director will also oversee the implementation of the four plans by the two dedicated staff. The Executive Director is not currently compensated to perform this niche work for the Children's Services Council.

In addition, the UPHS Executive Director and Director of Strategic Initiatives will have nominal responsibilities in managing this contract for Service Line 2, and access to a sub-contracted nonprofit specialized attorney as follows:

- UPHS Executive Director – 100% of expenses are absorbed by UPHS, however the UPHS Executive Director will provide general contract administration, participation in Agency-Focused Communities of Practice meetings, and training plan development, as well as review of completed competency reports before submission. Additionally, the UPHS Executive Director will provide day-to-day supervision of the Capacity Building Manager.
- UPHS Director of Strategic Initiatives – 90% of expenses are absorbed by UPHS, however the UPHS Director of Strategic Initiatives will provide support to the Capacity Building Manager the first 6 months of their onboarding to ensure they're familiar with the UPHS Capacity Building Benchmarking Assessment, Training Plans and Content Materials, as well as assisting with recruitment of CoP participants.
- Legal Services Nonprofit Specialized Attorney – 100% of expenses to cover up to ten (10) CoP cohort participants that require non-litigation legal assistance as part of their capacity

building efforts that could assist them in qualifying for, applying for, and/or improving their ability to receive funding from the CSC Leon. UPHS would sub-contract with Legal Services of North Florida for up to ten (10) agencies over the 20-month contract period. Each agency would receive a non-litigation service packet valued at \$1,000.00 for a total of \$10,000.00.

E. Deliverables & Payment Schedule

CSC Leon is issuing this 20-month contract commencing in February 2023 and concluding in September 2024. This corresponds with four funding cycles: two rounds of summer funding and two rounds of priority funding. The table below lists the expected deliverables, due dates and corresponding contract payment amount.

CSC Leon Summer 2023 Funding Cycle

Deliverable	Due Date	Report from	Contract \$
TA Plan	February 10, 2023	INIE	\$17,500.00
Application Wrap Up	June 1, 2023	INIE	\$17,500.00
CoP Development Plan	June 1, 2023	UPHS	\$18,556.57
CoP Final Report	September 15, 2023	UPHS	\$18,556.57

CSC Leon Priority Funding Cycle 1 (Family Supports)

Deliverable	Due Date	Report from	Contract \$
TA Plan	March 1, 2023	INIE	\$17,500.00
Application Wrap Up	August 15, 2023	INIE	\$17,500.00
CoP Development Plan	August 15, 2023	UPHS	\$18,556.57
CoP Final Report	December 30, 2023	UPHS	\$18,556.57

CSC Leon Summer 2024 Funding Cycle

Deliverable	Due Date	Report from	Contract \$
TA Plan	November 1, 2023	INIE	\$17,500.00
Application Wrap Up	May 1, 2024	INIE	\$17,500.00
CoP Development Plan	May 1, 2024	UPHS	\$18,556.57
CoP Final Report	August 15, 2024	UPHS	\$18,556.57

CSC Leon Priority Funding Cycle 2 (Prenatal/Postnatal)

Deliverable	Due Date	Report from	Contract \$
TA Plan	December 1, 2023	INIE	\$17,500.00
Application Wrap Up	June 30, 2024	INIE	\$17,500.00
CoP Development Plan	July 1, 2024	UPHS	\$18,556.57
CoP Final Report	September 30, 2024	UPHS	\$18,556.56

Budget (Service Line 1: Technical Assistance for Grant Seekers)

The Contract includes \$140,000.00 over 20-months (\$84,000.00 in Year 1 and \$56,000.00 in Year 2). However, the outline of the expenses exceed what is allocated for this service line as part of this work with CSC Leon, thereby demonstrating a 10% match by the Contractor.


Contract Budget Item	Budget Expense Annually	Budget Expense Narrative	Proposed Contract Reimbursement (20-months)	Proposed Contract Budget Narrative, based on 20-month contract
Salaries				
<i>INIE Executive Director</i>	\$7,500.00	<i>10% of INIE ED Time</i>	\$12,500.00	<i>10% of INIE ED Time – roles and responsibilities outlined in Exhibit I, Section D.</i>
<i>INIE Support Staff</i>	\$62,400.00	<i>2 Dedicated PT Staff to coordinate TA activities and facilitate training at \$30/hour for 20/hours/week</i>	\$104,000.00	<i>100% of Dedicated PT Staff to coordinate TA activities and facilitate training at \$30/hour for 20/hours/week</i>
Payroll Taxes	\$5,347.35	<i>Payroll Taxes at 0.0765% for 10% of ED and 100% of 2 Dedicated PT Support Staff</i>	\$8,912.25	<i>Payroll Taxes at 0.0765% for 10% of INIE Executive Director and 2 Dedicated PT Support Staff to coordinate TA activities</i>
Benefits/Fringe	\$1,748.06	<i>10% of INIE ED Healthcare, Retirement, and Life Insurance</i>	\$2,913.43	<i>10% share of INIE ED Healthcare, Retirement, and Life Insurance</i>
Occupancy and Utilities	\$7,200.00	<i>Facility space for INIE Staff at \$600/month</i>	\$6,000.00	<i>50% share of space for Dedicated PT Support Staff to coordinate TA activities. INIE rents office space for an average \$600/month. INIE will lose \$6,000 in potential revenue over the course of the contract from the one office space that will be shared by the two part time employees.</i>
Computer/Equipment/Phone	\$6,000.00	<i>100% share of Equipment, Computers, and Phone for 2 Dedicated PT Support Staff to coordinate TA activities</i>	\$3,174.32	<i>32% share of Equipment, Computers, and Phone for 2 Dedicated PT Support Staff to coordinate TA activities.</i>
Supplies and Materials	\$3,000.00	<i>100% shared of Office Supplies and Materials for 2 Dedicated PT Support Staff to coordinate TA activities</i>	\$2,500.00	<i>50% Office Supplies and Materials for 2 Dedicated PT Support Staff to coordinate TA activities</i>
TOTAL	\$93,195.41 Annually (true costs)		\$140,000.00/ 20-month CSC Leon contracted costs*	*Actual costs \$155,325.68 for the 20-month period.


Budget (Service Line 2: Communities of Practice for Unselected Applicants)

The Contract includes \$148,452.55 over 20-months (\$89,071.53 in Year 1 and \$59,381.02 in Year 2). However, the outline of expenses exceed what is allocated for this service line as part of this work with CSC Leon, thereby demonstrating a 31% match by the Contractor.

Contract Budget Item	Budget Expense Annually	Budget Expense Narrative	Proposed Contract Reimbursement (20-months)	Proposed Contract Budget Narrative, based on 20-month contract
Salaries				
UPHS Executive Director	\$9,800.00	10% of UPHS ED Salary	\$0.00	UPHS will absorb 100% share of UPHS ED expenses – roles and responsibilities outlined in Exhibit 1, Section D.
UPHS Director of Strategic Initiatives	\$14,600.00	20% of UPHS Director of Strategic Initiatives	\$7,300.00	10% share of Director of Strategic Initiatives expenses – roles and responsibilities outlined in Exhibit 1, Section D.
UPHS Capacity Building Manager	\$58,000.00	Dedicated FT Manager to coordinate CoP activities	\$96,666.67	100% share of Dedicated FT Manager to coordinate CoP activities
Legal Services Nonprofit Specialized Attorney	\$10,000.00	Dedicated LSNF Attorney for ten (10) agencies participating in CoP activities that may require non-litigation legal support	\$10,000.00	Support for ten (10) agencies participating in CoP activities that may require non-litigation legal support
Payroll Taxes	\$6,303.60	100% of Payroll Taxes at 0.0765% for UPHS ED, Director of Strategic Initiatives and FT Manager to coordinate CoP activities	\$7,395.00	100% share of Payroll Taxes at 0.0765% for Dedicated FT Manager to coordinate CoP activities (\$96,666.67 x 0.0765%)
Benefits/Fringe	\$10,600.00	100% of Healthcare, Retirement, Worker's Comp, Liability Insurance, etc. for Dedicated FT Manager to coordinate CoP activities	\$15,146.44	86% share of Healthcare, Retirement, Worker's Comp, Liability Insurance, etc. for Dedicated FT Manager to coordinate CoP activities
Occupancy and Utilities	\$16,000.00	100% of Facility space for UPHS Staff	\$4,444.44	17% share of space covering 100% share for Dedicated FT Manager to coordinate CoP activities
Computer/Equipment/Phone	\$3,000.00	100% of Equipment, Computers, and Phone for Dedicated FT Manager to coordinate CoP activities	\$5,000.00	100% share of Equipment, Computers, and Phone for Dedicated FT Manager to coordinate CoP activities
Supplies and Materials	\$1,500.00	Office Supplies and Materials for Dedicated FT Manager to coordinate CoP activities	\$2,500.00	100% share of Office Supplies and Materials for Dedicated FT Manager to coordinate CoP activities
TOTAL	\$129,803.60/ Annually (true costs) *		\$148,452.55/ 20-month CSC Leon contracted costs*	*Actual costs \$216,339.33 for the 20-month period.

Service Line 1: INIE Support Staff Position Descriptions (2 PTE)

	<h3>Training Facilitator Position Description</h3>
Overview	<p>The Institute for Nonprofit Innovation and Excellence (INIE) works to strengthen the capacity and impact of the nonprofit sector through advocacy, education, and collaboration.</p> <p>The Training Facilitator will lead a series of training sessions that support community-based organizations seeking to apply for funding from the Children's Services Council of Leon County (CSC Leon). This position will work closely with INIE's Executive Director and CSC Leon staff members.</p>
Location	<p>Institute for Nonprofit Innovation and Excellence 300 W. Pensacola Street, Tallahassee, FL 32301</p>
Supervisor	<p>Executive Director</p>
Responsibilities	<p>Main responsibilities include:</p> <ol style="list-style-type: none"> 1. Leading technical assistance training sessions in-person and virtually. 2. Providing guidance to organizations throughout the funding application process. 3. Receiving and responding to any application related inquiries made by organizations applying for funds. 4. Employing data collection best practices to assess organizational outcomes and report on findings.
Qualifications	<ol style="list-style-type: none"> 1. Knowledge of grant writing and reporting processes. 2. Proven experience in training groups and individuals. 3. Excellent oral and written communication skills. 4. Ability to manage multiple assignments. 5. Commitment to a fun, fast-paced and team-oriented working environment. 6. Willingness to comply with INIE's policies and procedures. 7. Ability to give and receive feedback in a positive manner. 8. A great attitude and work ethic. 9. The ability to work independently. 10. An aptitude for details. 11. Ability to maintain a professional appearance.
Hours and Days	<p>The Training Facilitator will work 20 hours per week at \$30 per hour with a mix of virtual and in-office hours during normal office hours 9:00 AM - 5:00 PM, Monday-Friday</p>
Computer Proficiencies	<p>Office 365, Google Docs, Forms and SharePoint, Scheduling Software, Zoom</p>

	<h2 style="text-align: center;">Technical Coordinator Position Description</h2>
Overview	<p>The Institute for Nonprofit Innovation and Excellence (INIE) works to strengthen the capacity and impact of the nonprofit sector through advocacy, education, and collaboration.</p> <p>The Technical Coordinator will implement a series of online and in-person training sessions that support community-based organizations seeking to apply for funding from the Children’s Services Council of Leon County (CSC Leon). This position will work closely with INIE’s Executive Director and CSC Leon staff members.</p>
Location	<p>Institute for Nonprofit Innovation and Excellence 300 W. Pensacola Street, Tallahassee, FL 32301</p>
Supervisor	<p>Executive Director</p>
Responsibilities	<p>Main responsibilities include:</p> <ol style="list-style-type: none"> 1. Implementing and marketing technical assistance training sessions. 2. Tracking and reporting data including registration demographics, training session attendance records, and technical assistance requests. 3. Employing data collection best practices to assess organizational outcomes and reporting on findings. 4. Related administrative support.
Qualifications	<ol style="list-style-type: none"> 1. Experience in scheduling online and in-person training sessions. 2. Familiarity with contract management reporting processes. 3. Excellent oral and written communication skills. 4. Ability to manage multiple assignments. 5. Commitment to a fun, fast-paced and team-oriented working environment. 6. Willingness to comply with INIE’s policies and procedures. 7. Ability to give and receive feedback in a positive manner. 8. A great attitude and work ethic. 9. Ability to work independently. 10. An aptitude for details. 11. Ability to maintain a professional appearance.
Hours and Days	<p>The Technical Coordinator will work 20 hours per week at \$30 per hour at the INIE office during normal office hours 9:00 AM - 5:00 PM, Monday-Friday.</p>
Computer Proficiencies	<p>Office 365, Google Docs, Forms and SharePoint, Scheduling Software, Zoom</p>

Service Line 2: UPHS Capacity Building Manager Position Description (FTE)



Capacity Building Manager Position Description

Summary

The Capacity Building Manager of United Partners for Human Services, Inc. (UPHS) reports to the UPHS Executive Director and is responsible for various projects which include planning, scheduling and facilitating the delivery of professional development, support, evaluation and resources to the human service's nonprofit community.

UPHS is a 501(c)(3) membership organization founded in 2004 and serves as a collective voice empowering human service organizations through advocacy, engagement, and education while positioning each member organization to perform and serve at its highest capacity.

This leadership position requires an experienced executive with extensive nonprofit management experience, experience in implementing effective program delivery strategies, a general understanding of the local human services ecosystem, and excellent communication abilities.

Primary Responsibilities

Under the direction of the UPHS Executive Director, the Capacity Building Manager will manage and implement a variety of projects that support community-based organizations seeking to apply for funding from the Children's Services Council of Leon County (CSC Leon). Specific duties include:

- Implement and oversee UPHS capacity building activities specific to the CSC Leon's Communities of Practice (CoPs) that provide training, skills development, technical assistance, networking opportunities and other supports for unfunded CSC Leon applicants. Activities include, but not limited to:
 - Completion of initial Capacity Building Benchmarking Assessment with unfunded applicants,
 - Creation of Capacity Building Assessment Training and Coaching Plans based on Capacity Building Benchmarking Assessment Results,
 - Ongoing support and progress monitoring meetings with unfunded applicants,
 - Completion of Agency Competency Report to assess viability of momentum, thus positioning unfunded applicant for success in future funding application cycles.
- Connect unfunded applicants with other member organizations for peer-to-peer mentoring for greater collaboration, and implementation of best practices.

- Respond to technical assistance inquiries from unfunded applicants by assessing their needs, providing training and development that addresses the identified needs, and providing information and resources to assist the organizations enhance their capacity.
- Work with UPHS staff to measure and report on the impact of capacity building services.
- Maintain and develop relationships with UPHS partner organizations and manage appropriate and meaningful correspondence through a variety of mediums.
- Acquire and maintain a database of resources, nonprofit consultants, and subject matter experts to support partner organizations as outlined in their Capacity Building Assessment Results and Training Plan.
- Assist the UPHS Executive Director with special projects associated with capacity building efforts at UPHS specific to the CSC Leon's CoPs.
- Performs special assignments and other work, on an as-needed basis.

Qualifications and Requirements

To perform this job successfully, an individual must be able to perform each essential job function satisfactorily. The requirements listed are representative of the basic knowledge, skills, and/or abilities required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The individual in this role must display the highest level of integrity and confidentiality. UPHS also values innovative thinking, and a successful candidate will be a self-starter who can work within the team to achieve goals and objectives. The individual should have effective communication skills, attention to detail and organization, flexibility, adaptability and the ability to multi-task and be open-minded in a fast-paced environment. The individual will also maintain knowledge of trends in his/her area of responsibility and reviews literature to understand key issues.

Education and Experience

4-year degree required with 5+ years of nonprofit management experience. Bachelor's degree in education, social work, business administration, public administration, or related area with a focus on nonprofit management and/or governance required. The ability to facilitate workshops, focus groups, task groups, etc., is required. Proven experience with professional development and training, with a focus on adult learning, is a plus. Must be competent in oral and written communications. The ability to effectively participate in group planning and project implementation is required. Knowledge and understanding of nonprofit organizations are required.

Skills and Competencies

Excellent project management and public relations skills required. Ability to define problems, collect data, establish facts, and draw valid conclusions. The ability to effectively manage a multifaceted project in multiple environments is required. Must have effective organizational and interpersonal skills, the ability to work independently, a talent for forming and maintaining external relationships, and an attitude toward achieving outcomes. Initiative, detail, and team orientation are essential. Experience in developing a base of community influence, competency in tactful and diligent relationship building, ability to maintain high visibility in the local community to advocate for UPHS's mission and its members. Ability to connect and

communicate effectively with diverse communities; Experience collaborating with, reporting to, and taking guidance from a Board of Directors; Valid Florida Driver's License.

Organizational Structure

The Capacity Building Manager reports directly to the UPHS Executive Director.

Compensation

Competitive salary and benefits package set by the UPHS Executive Director based on experience and agency's budget and financial condition. In addition, annual goals are set for the Capacity Building Manager and progressed is assessed annually by the Executive Director.

UPHS is an Equal Opportunity Employer

Investment Workgroup Update

The Investment Workgroup met virtually on Wednesday, January 4, 2023.

Workgroup Members Present:

- Ms. Liza McFadden, Community Member, Workgroup Chair
- Mr. Scott Fennell, CPA, Florida Department of Financial Services
- Mr. Scott Ross, Office of Financial Stewardship, Leon County Government
- Mr. John Grayson, CPA, Grayson Accounting & Consulting, CSC Leon Contract CPA
- Ms. Cecka Rose Green, CSC Leon Executive Director

Workgroup member, Mr. Padric Scott was absent due to a previous engagement.

Discussion:

The Workgroup continued discussion on establishing a Reserve Policy for CSC Leon regarding external investment opportunities. The members reviewed drafts of the Reserves Policy and the RFI.

In summary:

- The draft Reserves Policy recommends establishing both Catastrophe and Contingency Fund categories, with the combined allocation to be 10% of the annual budgeted ad valorem tax revenue—2% for the Catastrophe category and 8% for the Contingency category.
- The workgroup recommended the draft Reserves Policy and draft RFI be presented for review by the full Council at the January 19, 2023, meeting.



Reserves Policy

The purpose of this Reserves Policy ("Policy") is to set forth the reserve funds objectives and parameters to manage both Catastrophe and Contingency Funds for the Children's Services Council of Leon County ("CSC Leon"), Florida. This Policy is designed to ensure the prudent management of public funds and the availability of operating funds, when needed. CSC Leon believes that sound financial management principles require that sufficient funds be retained by the Council to provide a stable financial base at all times. To retain this stable financial base, the Council needs to maintain a Reserves Fund Balance sufficient to support all cash flows, provide financial resources for unanticipated and/or unforeseen expenditures of an emergency nature, and to offset significant economic downturns or revenue shortfalls.

This policy will specify the size and composition of the Council's financial reserves.

1. Catastrophe Reserves:

- a) Catastrophe Reserves will be maintained at 2% annualized of the budgeted ad valorem tax revenue for the ensuing year.
- b) Catastrophe Reserves will provide immediate cash flow in the event of a natural disaster to bridge gaps in services until long-term solutions are established.
- c) Funding at the state level designated for natural disasters will be leveraged prior to utilizing CSC Leon Funds.
- d) The Council will have the ability to reallocate funding within the Reserve categories should it be deemed necessary to address any immediate needs.

2. Contingency Reserves:

- a) Contingency Reserves will be maintained at 8% annualized of the budgeted ad valorem tax revenue for the ensuing year.

- b) Contingency Reserves will provide immediate cash flow to support the continued operations of CSC Leon to include payment of staff salaries, purchase of materials and equipment, and continued contractual obligations as deemed necessary.
- c) Contingency Reserves can be utilized in the event of unexpected operational circumstances to include, but not be limited to, reduction in the collection of ad valorem tax revenue and/or significant economic downturns.
- d) The Council will have the ability to reallocate funding within the Reserve categories should it be deemed necessary to address any immediate needs.

Annual Review:

The Council will determine compliance with the provisions set in this policy as part of the annual budget process. As such, the Council will review the allocation and use of Reserves funding to determine the suitability of the amount allocated in the budget for the ensuing year.

Request for Information (RFI)
Investment Advisory Services
Children's Services Council of Leon County (CSC Leon)

Issue Date: TBD

Response Deadline: TBD

ALL RESPONSES SHOULD BE SUBMITTED IN WRITING VIA EMAIL TO procurement@cscleon.org.
UNDER NO CIRCUMSTANCES SHALL ANY RESPONDENT CONTACT ANY CSC LEON COUNCIL
MEMBER OR STAFF REGARDING THIS NOTICE.

THIS IS NOT A REQUEST FOR PROPOSAL. THIS IS FOR INFORMATIONAL PURPOSE ONLY; NO
QUESTIONS WILL BE ACCEPTED IN RESPONSE TO THIS RFI. NO AWARD WILL BE MADE ON THE
BASIS OF RESPONSES RECEIVED TO THIS NOTICE.

I. INTRODUCTION

The Children's Services Council of Leon County (CSC Leon) is issuing this Request for Information (RFI) to assess options for investment and cash management services from qualified vendors that have expertise and knowledge with the investment of public funds. CSC Leon has identified the following broad principles for its investment strategy:

1. Safety of Principal;
2. Maintenance of Liquidity; and
3. Return Maximization.

CSC Leon is an independent, special taxing district in Leon County, Florida, established in November 2020. CSC Leon serves a population of nearly 200,000 and has an annual average general fund revenues of \$7.8 million.

CSC Leon's potential investment portfolio consists of approximately \$800,000 to \$1,000,000 in general operating and reserve funds (no pension funds). CSC Leon currently manages excess funds in money market accounts. CSC Leon expects to transition to a third-party safekeeping arrangement if/when the transition to a fee-based investment advisor model is made. The transition to a fee-based investment advisor solution is being considered to enhance portfolio return, properly manage risk, maintain continuity, and ensure that investment decisions are made and executed in the best interest of CSC Leon.

Ultimately, CSC Leon's goal is to maximize interest earned while minimizing risk on its cash reserves and leverage its fund balance without compromising liquidity.

Responses to this RFI will be used as inputs to CSC Leon's decision-making process.

All information received in response to this RFI marked "Proprietary" will be handled accordingly. Responses to the RFI will not be returned. Responses to this RFI are not considered offers and will not be accepted by CSC Leon to form a binding contract. Responses to this RFI will assist CSC Leon in determining the potential level of interest, competition adequacy, and technical capabilities of commercial vendors to provide the required products and services. CSC Leon does not guarantee any action beyond this RFI.

II. BACKGROUND

CSC Leon is a catalyst for positive change to improve the lives and outcomes of children and families in the local community. Approved by a majority of the Leon County ("County") electorate in the November 2020 general election, CSC Leon has been established to provide children with early learning and reading skills, development, treatment, preventative and other children's services. In 2021, the 10-member CSC Leon Governing Council set the millage rate at

0.375 generating \$7,335, 558. In 2022, the same millage is proposed to generate an estimated \$8,041,249 in revenue.

As an independent special district authorized by section 125.901, Florida Statutes, CSC Leon will provide funding for these children's services throughout the County by annually levying ad valorem taxes, not exceeding the maximum millage rate of one-half (1/2) mill. CSC Leon has independent oversight and accountability, and the following powers and functions:

1. To provide and maintain in the County such preventive, developmental, treatment and rehabilitative services for children as CSC Leon determines are needed for the general welfare of the County.
2. To provide such other services for all children as CSC Leon determines are needed for the general welfare of the County.
3. To allocate and provide funds for other agencies in the County which are operated for the benefit of children, provided they are not under the exclusive jurisdiction of the public school system.
4. To collect information and statistical data and to conduct research, which will be helpful to CSC Leon and the County in deciding the needs of children in the County.
5. To consult with other agencies dedicated to the welfare of children, to the end that the overlapping of services will be prevented.
6. To lease or buy such real estate, equipment, and personal property and to construct such buildings as are needed to execute the foregoing powers and functions, provided that no such purchases shall be made or building done unless paid for with cash on hand or secured by funds deposited in financial institutions. Nothing in this subsection shall be construed to authorize CSC Leon to issue bonds of any nature, nor shall CSC Leon have the power to require the imposition of any bond by the Board of County Commissioners.
7. To employ, pay, and provide benefits for any part-time or full-time personnel needed to execute the foregoing powers and duties.

III. Investment Advisory Services

The following describes the basic scope of services that CSC Leon anticipates needing.

1. Prepare a written Investment Policy Statement (the "IPS"). The IPS will establish the investment policies and objectives of CSC Leon, set forth the asset classes and investment categories to be sought, and define the criteria and standards for selecting and monitoring investments.

2. Provide investment recommendations regarding the specific selection criteria set forth in the IPS.
3. Monitor the core investment funds being utilized to assure both ongoing compliance with the objective criteria as outlined and required by the IPS as well as ongoing satisfaction of reasonable objective and subjective criteria.
4. Make recommendations regarding investments including, but not limited to, investment changes or supporting documentation as to the ongoing retention of investments when such recommendations are deemed advisable.
5. Provide on-site investment reviews with the Governing Council or committee, generally accepted to be held quarterly during the first year, transitioning to a semi-annual basis thereafter. The meetings will be held at the CSC Leon public office in Tallahassee, Florida.

IV. RESPONSE CONTENT

CSC Leon would like to obtain the following information about investment and cash management services that will ultimately meet the functions described in section III:

Organization and Background

1. Briefly describe your organization, the year it was founded, location of its headquarters and other offices, its ownership structure, and affiliation with other companies.
2. Please describe the entire range of investment management services your firm provides to clients. Indicate which services are your firm's specialties or areas of greater expertise. Why did you choose the specific area of expertise and how is the expertise maintained and expanded?
 - a) Do you offer a fund or product that is fixed or backed by fixed assets with high liquidity (liquidation within a day)? Does this fund or product allow for less than a million invested to participate?
 - b) How many participants are included in the pool?
3. Disclose all conflicts or potential conflicts of interest the firm has in serving in an investment manager relationship (e.g., relationships with custodians, investment managers, brokerage firms, etc.).
4. Has the firm or any officer or principal of the organization been involved in litigation related to investment management activities, or have they otherwise been involved in a SEC investigation or litigation? If yes, provide a brief summary and indicate the current status of the proceedings.
5. List any other support services the firm provides CSC Leon, if applicable (e.g., customized research projects, educational seminars, etc.).
6. Describe the firm's expertise in handling monies originating from public funds, specifically for Florida cities, counties or special districts.
7. Describe the financial condition of your firm.

Staffing

8. Provide an organizational chart that includes all individuals employed in the investment management group. Specifically identify consultants, professional support staff, and administrative staff, along with professional designations.
9. List the personnel you would likely propose to assign to this relationship and their responsibilities. Provide brief biographical information on each individual including their positions in the company, education, training, and years and type of experience in investment management.
10. Describe the turnover of portfolio managers and professional support staff over the past five years.

Client/References

11. Identify the types of accounts primarily sought by your firm.
12. Attach a list of three Florida references, including at least one client similar to CSC Leon in size and scope of investment. Indicate the contact's name, address, email address, and telephone number. Indicate the length of time you have provided investment services to the client and the type of services provided.

Performance Measurement and Evaluation

13. Describe the methods and sources of data used for analyzing the performance of investment managers and the portfolio. Specifically, include the monitoring of performance, risk, style, etc. Which benchmarks are most appropriate for this portfolio? Should we expect an incremental increase in return over the benchmark return?
14. How many business days after the end of a reporting period are the performance reports available? Can the reports be customized? Does the firm offer web access to the investment portfolio? Please provide a sample monthly client report.

Technology

15. What technological capabilities does the firm have to add value and efficiencies to the investment management process? Does the firm have a website? If yes, please provide the website address and a brief commentary on information typically accessible on the website to clients.
16. Describe the top two technology initiatives/enhancements your firm will be implementing or developing in the next 12 to 24 months.

Investment Strategy

17. Briefly describe your firm's investment management philosophy including your approach to managing portfolios for cities, counties or special districts.
18. What are the primary strategies for adding value to the portfolios?

19. Describe the ongoing daily investment procedures. Include procedures for trades, security selection, controls, etc., and how will you provide necessary liquidity.
20. How frequently would you suggest your staff meet with CSC Leon staff and Investment Committee? Who will attend these meetings?

Fee

21. Outline your fee schedule that would likely apply to CSC Leon. Include in the fee schedule any and all applicable fees to perform investment advisory services.
22. What, if any, are the start-up costs (e.g., development of IPS, etc.)?

Summary

23. What do you believe sets your firm's services apart from the competition and what unique value-added services could you provide for CSC Leon? Please respond by using an example of how your firm assisted a similar client to build a successful investment program.

V. SUBMISSION DETAILS

Interested businesses shall submit electronic responses; responses must be received by Dina Snider at procurement@cscleon.org no later than March 3, 2023, at 5:00 p.m. ET.

Responses must be submitted electronically, formatted in Microsoft Word or Microsoft Excel (any version). Margins must be 1" on all sides, to print on 8 ½" x 11" paper. Calibri typeface, 12-point font is preferred. Responses should be specific to the response content outlined in section III, and include the following: company name, address, website and point-of-contract (POC) including name, phone number and email address.

The page limitation is 15 pages and respondents are cautioned to keep marketing materials and non-specific information to a minimum. No responses shall be accepted via US Mail or Fax.

Disclaimer: This is a Request for Information only to identify sources that can provide investment and cash management services.

Program Services Committee Report

The Committee met on Thursday, January 12, 2023, at the CSC Leon Office.

Committee Members present:

- Mr. Darryl Jones, School Board Member, Committee Chair
- Ms. Liza McFadden, Community Member
- Mrs. Carmen Connor, Community Member
- Mr. Mark O'Bryant, Community Member

Dr. Zandra Glenn was absent due to a previous engagement.

Discussion

The Committee reviewed/provided edits for the following:

1. Draft of the Community Investment Partners (CIP) Funding Policy, including revisions to the list of definitions to be included;
2. Draft RFA for Summer Bridge Funding; and
3. Draft CIP Information Security Policy.

Also, the Committee reviewed a proposed collaborative partnership with the Early Learning Coalition of the Big Bend (ELC) to create a local funding category that will allow ALICE families in Leon County to enter the School Readiness program, creating an “on ramp” for families to access an existing support program. This partnership can help to better leverage existing federal dollars (included in meeting packet).

Staff was directed to incorporate Committee edits into the documents prior to the next Governing Council meeting on Thursday, January 19, 2023.

The Committee also had discussion regarding the timelines presented for the Summer Bridge Funding RFA, and two priority funding ITNs for Family Support Services and Prenatal/Postnatal Supports, respectively. Included in the discussion was whether current staffing was appropriate for the impending workload. As such, the Committee directed the Ms. Green to prepare information on additional staffing needs to present to the Finance and Budget Committee, and then to the full Council.

Committee Recommendation

The Program Services Committee recommends the following be presented to the full Council for review:

- Draft Community Investment Partners (CIP) Funding Policy, to include the draft Definitions; and
- Draft CIP Information Security Policy.
- Proposed partnership with ELC of the Big Bend Staff to create a local funding category that will allow ALICE families in Leon County to enter the School Readiness program, creating an “on ramp” for families to access an existing support program.



CSC Leon County Community Investment Partner (CIP) Fiscal Guidelines

INTRODUCTION

CSC Leon Establishment

The Children's Services Council of Leon County (CSC Leon) was established by voters in November 2020 to help provide various services to children, and families, such as early learning and reading skills, youth development, physical and mental treatment, preventative, and other services (Leon County Ordinance, No. 18-13). As an independent special district authorized by section 125.901, Florida Statutes, CSC Leon will provide funding for these children's services throughout the County by annually levying ad valorem taxes, not to exceed the maximum millage rate of one-half (1/2) mill.

CSC Leon Mission

CSC Leon is a catalyst for positive change to improve the lives and outcomes of children and families in our community. Using strategic partnerships and data driven decision-making, CSC Leon is investing in key priority areas, as follows: Success in School and Life; Healthy Children, Youth and Families; and Stable and Nurturing Families and Communities.

CSC Leon Vision

The vision of CSC Leon is that all children, youth, and families in Leon County are socially, emotionally, and physically equipped to reach their full potential.

Guiding Principles

1. CSC Leon County will spend funds efficiently and in the best interest of CSC Leon and the public.
2. All purchases in the operating budget will be procured through one of several purchasing processes authorized by this policy.
3. CSC Leon purchasing activities will advance the goals and objectives of the Minority, Women, and Small Business Enterprise Policy of the Office of Economic Vitality.
4. CSC Leon will comply with any additional regulatory requirements that may be associated with particular funding sources (e.g., 2 CFR Part 200 for federal awards).
5. CSC Leon County fosters collaboration among provider agencies and encourages assessment of collective impact with community partners to develop increasingly robust systems of care.

6. CSC Leon County funding is informed by current qualitative and quantitative data that indicates essential areas for positively impacting children's wellbeing.
7. CSC Leon County holds itself to the highest standards of fiscal and operational accountability. CSC Leon County entrusts public funds to those agencies that seek increased efficiencies and economies of scale, demonstrate competence, and show evidence of fiscal and program accountability.
8. CSC Leon County strategically addresses emerging issues and service gaps where impact can be demonstrated and measured for efficiency and effectiveness.
9. CSC Leon County provides public education, advocacy on behalf of children and families, access to information, and research to guide strategic decision-making.

Goals of the Grant Funding Policies

The Community Investment Partners (CIP) Funding Policy is intended to summarize how CSC Leon will fund programs and services, and to help establish mutually understood guidelines for the fiscal management of funds entrusted to the Council to distribute for the benefit of children, youth and families residing in Leon County. Additional goals of this policy include: to maximize the impact of funding received by a program through its contract with CSC Leon; to minimize disallowances of expenditures; to help Community Investment Partners (CIP) develop program budgets and fiscal plans for a program; and to help CIPs operate their programs according to sound accountability principles.

Fiscal and Reporting Period

Funding provided by CSC Leon will cover the contract year beginning on October 1 and end on the following September 30. The reporting period will correspond with the same funding period.

Role of the CSC Staff

The CSC staff is charged with reviewing and processing all disbursements and financial reports in conjunction with CSC Leon-funded programs. This review process is intended to ensure that funded programs spend within their approved budgets, use funds as intended and for the duration of the contract period, and that funding requests are presented on an established disbursement basis, ultimately to ensure the program outcomes are met. Programs are also subject to on-site monitoring reviews. CSC staff is available for technical assistance upon request.

For any given contract year, the Council can take action that may impact that year's funding. As such, the action of the Council may take precedence over the guidelines set in this policy for that specific year.

ELIGIBILITY

Eligible Entity

An entity seeking to apply for Community Impact Partner (CIP) funding for a program/project must be an incorporated not-for-profit, neighborhood, or local government organization. However, a for-profit organization may apply for CSC Leon funds so long as the program/project to be funded does not generate a profit for the organization.

Ineligible entities or programs include those that operate under the exclusive jurisdiction of the public school system, individuals, and foreign-based company/organizations.

Eligible Programs and Projects

1. Funded programs and/or projects are required to be in direct alignment with the priorities, goals, objectives, and strategies as defined by CSC Leon.
2. The target population for the purposes of CSC Leon funding is limited to programs supporting children and youth, ages prenatal to age 24 years and to qualified families with said children and youth, residing in Leon County.
3. As required by law, CSC Leon funds shall not be used to supplant existing resources.
4. Programs that require religious instructional activities and/or worship as a condition of participation shall not be funded by CSC Leon.
5. CSC Leon will not provide funding to organizations for the acquisition of real property.

FUNDING and REPORTING

Basis of CSC Leon Funding

The funding awards approved by Council are based on both programmatic and financial considerations. Staff reviews the purpose for which all dollars are to be expended as outlined in the program or project budget narrative submitted in the proposal or application package. As such, line-item budgets initially approved by CSC Leon are meant to be followed by specific line item. CSC Leon funding disbursements should only be applied against the line item for which the expense applies. Funds may be withheld until all outstanding requirements have been satisfied for all contracts executed with an organization. Future contract issuance and/or execution may be withheld until all outstanding CSC Leon requirements for the current contract year have been satisfied. CSC Leon funding is established in the following community investment categories: Priority Funding, Summer Bridge Funding, and Innovation Funding.

Disbursement of Awarded Fund

For most contracts for programs, services or projects, CSC Leon disburses funding to CIPs on a quarterly basis. The initial disbursement will be a 25% advancement of the total program budget for the contract, with subsequent quarterly disbursements. Expenses reported for a specific quarter are to be actual expenditures for that quarter and must be supported by complete and appropriate documentation. The documentation should include only those expenses paid with CSC Leon funding in the quarter for which the reporting is being submitted. Specific support documentation requirements are discussed in detail

within the “Required Reporting Documentation” section of this policy. A contract must be duly executed to receive the initial funds disbursement. The quarterly disbursement of funds for the community investment categories is outlined as follows:

1. Summer Bridge Funding: Three-month cycle

- a. Two disbursements will be made to funded programs during Summer Bridge Funding.
- b. Initial disbursements will cover program budget expenses from May 15 to July 15; this 15-day start-up timeframe provides revenue for programing to begin on June 1.
- c. Upon review and approval of an entity’s mid-summer report (due on July 10), the second and final disbursement will cover program budget expenses from July 16 to August 30, with the final summer report due on September 15.
- d. Unspent contract funds shall be returned to CSC Leon by no later than September 30.
- e. Community Investment Partners shall not be considered for future funding until all requirements of any current contract are met.

2. Family Support Services Priority Funding (Initial Timeframe – August 1, 2023, to September 30, 2024): One-, Two- or Three-year cycle(s)

- a. Initial disbursement will cover program budget expenses from August 1 to October 15, 2023, with the initial quarterly report for August 1 to September 30, 2023 (two months), due within 7 days from the end of the quarter (this corresponds with the Fourth Quarter of CSC Leon’s fiscal year).
- b. Upon review and approval of the initial quarterly report, the second disbursement will be issued to cover program budget expenses from October 16, 2023, to January 15, 2024, with the second quarterly report for October 1 to December 31, 2023, due within 7 days from the end of the quarter (this corresponds with the First Quarter of CSC Leon’s fiscal year).
- c. Upon review and approval of the second quarterly report, the third disbursement will cover program budget expenses from January 16 to April 15, 2024, with the third quarterly report for January 1 to March 31, 2024, due within 7 days from the end of the quarter (this corresponds with the Second Quarter of CSC Leon’s fiscal year).
- d. Upon review and approval of the third quarterly report, the fourth disbursement will cover program budget expenses from April 16 to July 15, 2024, with the fourth quarterly report for April 1 to June 30, 2024, due 7 days from the end of the quarter (this corresponds with the Third Quarter of CSC Leon’s fiscal year).
- e. Upon review and approval of the fourth quarterly report, the final contract year-end disbursement will cover program budget expenses from July 16 to September 30, 2024, with the final quarterly report for July 1 to September 30, 2024, due by October 15, 2024.
- f. For multi-year contracts, a renewal/budget amendment will be initiated on or around August 1 of the contract year; once approved, initial disbursement for the subsequent contract year will cover program budget expenses from October 1, 2024, to January 15, 2025, with the initial quarterly report for October 1 to December 31, 2025, due within 7 days from the end of the quarter (this now corresponds with the First Quarter of CSC Leon’s 2024-25 fiscal year).
- g. Upon review and approval of the initial quarterly report, the second disbursement will cover program budget expenses from January 16 to March 31, 2025, with the second quarterly report

for January 1 to March 31, 2025, due 7 days from the end of the quarter (this now corresponds with the Second Quarter of CSC Leon's 2024-25 fiscal year).

Note: CSC Leon Staff will include the disbursement and reporting timeline in the draft, final and executed contracts with a CIP.

- h. Quarterly reports received after the 7th day will not be reviewed until CSC Leon staff has completed the review of timely submitted reports. Late reports will be noted as such and may result in delays to the next disbursement. Habitually late reports may negatively impact the CIP's ability to apply for future funding from CSC Leon.
- i. Unspent contract funds shall be returned to CSC Leon by no later than October 31 of any funding year.
- j. Community Investment Partners shall not be considered for future funding until all requirements of any past or current contract are met.

3. Innovation Funding: Yearly Funding

- a. Initial disbursement will cover program budget expenses from October 1 to January 15, with the initial quarterly report for October 1 to December 31, due within 7 days from the end of the quarter.
- b. Upon review and approval of the initial quarterly report, the second disbursement will cover program budget expenses from January 16 to March 31, with the second quarterly report for January 1 to March 31, due 7 days from the end of the quarter.
- c. Upon review and approval of the second quarterly report, the third disbursement will cover program budget expenses from April 1 to July 15, with the third quarterly report April 1 to June 30, due 7 days from the end of the quarter.
- d. Upon review and approval of the third quarterly report, the fourth disbursement will cover program budget expenses from July 16 to September 30, with the fourth quarterly report for July 1 to September 30, due 7 days from the end of the quarter.
- e. Quarterly reports received after the 7th day will not be reviewed until CSC Leon staff has completed the review of timely submitted reports. Late reports will be noted as such and may result in delays to the next disbursement. Habitually late reports may negatively impact the CIP's ability to apply for future funding from CSC Leon.
- f. Unspent contract funds shall be returned to CSC Leon along with the year-end report by no later than October 31 of any funded year.
- g. Community Investment Partners shall not be considered for future funding until all requirements of any current contract are met.

BUDGETS, DOCUMENTATION and FUNDS DISBURSEMENT

Program Budget

A budget represents the total fiscal plan for a program or project for which an entity is seeking funding from CSC Leon. It is expected that submitted budgets for any program will support the policies and

procedures of the submitting entity, and that the entity's written policies have been approved by its governing body well in advance of said entity seeking funding from the Council. CSC Leon expects initial budgets to be detailed and to itemize all anticipated expenditures for the program or project.

Budget Line Item/Category Definitions

The program budget is comprised of line items with specific definitions or inclusions. The following line items are generally utilized when developing a program's budget narrative. In submitting quarterly reports to CSC Leon for funded program, the approved budget narrative based on the definitions below and contained within the executed contract, should be used to apply funds to line items. Note that in any line item, only the share of costs/expenditures that were paid using CSC Leon funds should be included.

- i. **Administrative Costs** – All direct and indirect costs associated with the management of Community Investment Programs; CSC Leon will allow up to an 18% administrative percentage.
- ii. **Advertising** – Costs related to advertising for program promotion, staff recruitment and/or volunteers for the program. This line item can also be used for promotional items purchased for the program.
- iii. **Audit Expense** – The program's pro rata share of the annual independent financial audit expense.
- iv. **Books/Educational Materials** – Cost of materials used in the program as an educational tool for the clients (e.g., books, reading materials, games, puzzles, videos, etc.).
- v. **Equipment Purchases** – Equipment purchased as a necessary item for the operation of the program. Equipment purchased with CSC funds becomes the property of CSC if the program terminates within two years of the equipment purchase.
- vi. **Equipment Rental & Maintenance** – The cost of renting and maintenance of equipment, including copiers, computers, postage equipment, etc.
- vii. **FICA** – The employer's mandatory 7.65% for Social Security. This calculation is only the employer's share of FICA. FICA must not be calculated for contract employees. Note that some payroll items may not be subject to FICA and thus your program budget for FICA may be less than 7.65%. In that case enter the lesser amount. Only include reporting for the amount of FICA paid.
- viii. **Food & Nutrition** – The cost of nutritional food items served to clients of the program. Food items for Staff or Agency Board members is not eligible for reimbursement.
- ix. **Insurance** – Cost of general liability, professional liability, property, business auto, crime bond, and directors' and officers' liability insurance as determined necessary for the operation of the program.
- x. **Life/Health Insurance** – The employer's share for any life and/or health (medical) insurance program the employer offers its employees.
- xi. **Occupancy (Building & Grounds)** – All costs related to the program's place of business. Includes rent (building and land), mortgage, contracted janitorial and maintenance services, exterminating expenses, cost for electric, water, sewer and waste removal, and occupancy related licenses and permits.
- xii. **Office Supplies** – Cost of all supplies and materials used by the program staff that may include office and housekeeping supplies.

- xiii. **Other/Contract** – Specific costs for contractual services not reportable on any other line item as detailed in the program’s budget narrative.
- xiv. **Other/Miscellaneous** – Specific program related costs not reportable on any other line item (e.g., background checks, volunteer testing, etc.) as detailed in the program’s budget narrative.
- xv. **Professional Fees** – Cost of fees and charges of professional practitioners, technical consultants, or semi-professional technicians who are not employees of the program and are engaged as independent contractors for specified services on a fee or other individual contractual basis. This line item would include attorney, accountant, or consultant fees. Contracted janitorial maintenance and repair services related to buildings and grounds should be included in the “Occupancy” line item.
- xvi. **Postage/Shipping** – Postage, parcel post, commercial trucking, and other delivery service costs. Costs of postage meter rental should be listed under the “Equipment Rental & Maintenance” line item.
- xvii. **Printing & Publications** – Includes cost of brochures, videos, and other informational materials for the program. Copy machine rental or leasing costs should be listed under the “Equipment Rental & Maintenance” line item.
- xviii. **Retirement** – The employer’s share for program employees’ retirement.
- xix. **Salaries** – All program salaries including full-time, part-time, and temporary staff to include fringe and benefits paid to an employee(s) working directly in the program.
- xx. **Specific Assistance to Individuals** – Expenses for specific materials, rental and utility subsidies, and any other assistance rendered to clients as detailed in the budget narrative.
- xxi. **Telephone** – Expenses for all telephone services, internet, and communication lines.
- xxii. **Travel (Daily)** – Mileage costs associated with the daily operation of the program. The mileage rate allowed is the current IRS rate “as amended.” The IRS rate effective on January 1, 2022, is \$0.585 per mile. To support the amount requested for mileage reimbursement, please provide documentation of dates traveled, miles traveled, purpose and locations visited, start and end points, and the rate applied to the mileage for CSC reimbursement. Only the amount paid by the agency/program to its employees can be reimbursed up to this maximum rate, and those payments to employees must be documented.
 - a. Expenses for fuel are allowable only for business-owned vehicles that are used for the CSC funded program. For business vehicles for which fuel is purchased, fuel receipt forms must be provided for each purchase and a monthly vehicle mileage log to show vehicle usage must be submitted for each vehicle for which fuel is purchased with the quarterly reporting. Note that these business vehicles will not be allowed additional per mile reimbursement.
- xxiii. **Workers Compensation** – The amount paid for workers compensation insurance as assigned by the carrier.

Budget Transfers

Once the contracted program budget has been approved, the CIP may reallocate between line items by up to 10% without approval from CSC Leon staff; for reallocations that exceed this, the CIP must submit a Budget Transfer Request for review and approval. Additionally, **in no instance may a CIP reallocate allocations in salaries and compensation without submitting a Budget Transfer Request to CSC Leon for review and approval.** As such, the total approved contracted program budget must remain the same, and no additional dollars can be requested to add to a program budget during the fiscal year. All Budget Transfer Requests must be submitted to CSC Leon for approval prior to the adjustments being made. In reviewing and approving a Budget Transfer Request, CSC Leon staff will consider the overall impact on the program and its expected outcomes and goals. CSC Leon will accept Budget Transfer Requests via the SAMIS portal, only. The official “date of receipt” for the Budget Transfer Request will be the actual date that staff receives a complete or revised request.

It is the responsibility of program/entity staff to monitor its budget and submit timely Budget Transfer Requests, as deemed appropriate. The program budget should be reviewed monthly to ensure compliance; additionally, programs should consider performing a routine review after submitting the Second Quarterly Report to ensure there is sufficient time to submit any Budget Transfer Requests.

Approval of the Budget Transfer Request will be provided to the program by CSC Leon staff through the SAMIS portal.

Required Reporting Documentation

SAMIS (Services and Activities Management Information System) is the web-based reporting system CSC Leon used to increase the efficiency of program-related and financial data between CSC Leon and its funded CIPs. All funded CIPs are to use the SAMIS system TO SUBMIT ALL INFORMATION unless specific authorization to use an alternative method of reporting has been provided in writing from CSC Leon staff. This includes all data, budgets and approved amendments, quarterly reports, and final reports. Additionally, submitted program budgets and subsequent budget amendments must be balanced, meaning the total budgeted program expenses paid with CSC Leon funds must equal the total CIP program approved allocation from CSC Leon.

Prior to a CIPs receiving its first quarterly funding disbursement, CSC Leon must have the following information on file:

1. A fully executed contract inclusive of an approved line-item budget (CIP signed and CSC Leon counter-signed).
2. A Certificate of Insurance as documentation of the coverage required by the contract.
3. The CIPs organization chart.
4. The CIPs official certificate of business registration with the Florida Department of State, Division of Corporations (SunBiz).
5. IRS Non-profit status determination documentation, if applicable.
6. Letters of Agreement from partner organizations, if applicable.
7. Full program operational budget without CSC Leon funding.

8. Either a current independent audit report or an official copy of the entity's IRS Form 990, as required by CSC Leon policy and contract. The CIP should abide by Fla. Stat. 496 Section 407 for determination as to which annual financial statement must be filed.

Also, complete documentation of the information listed above must be available for viewing at the entity's location upon request at on-site visits, which may occur at any time during the contract period.

Funds Disbursement

As CSC Leon wants to ensure timely disbursement of funds to CIPs, it is important for CIPs to submit COMPLETE documentation for all expenditures with the quarterly report.

Supporting documentation – Consists of at least two (2) forms of documentation:

1. **Expense detail (receipt/invoice)** – full description of item(s) purchased, cost of said item(s), date purchased, vendor, form of payment, etc.
2. **Proof of Payment by CIP (check/ACH)** – payment must show the CIP, or its designated staff person paid for the expense.

Support documentation must include both the expense detail and proof of CIP payment to be considered complete and eligible to be paid with CSC Leon funds. Support can include but may not be limited to the following:

- a. Copies of cleared/cancelled checks, bank statement or bank transaction detail.
- b. Copies of payroll checks or reports, deposit reports, payroll tax deposit (FICA).
- c. Receipts, invoices, bills, credit card statements, etc.
- d. Travel vouchers/expense reports, including mileage and rate of reimbursement.
- e. Worker's Compensation Policy (to show rate charged).
- f. Fringe benefit invoices (for payments on health insurance, retirement, life insurance, etc.).
- g. Worksheet or memo detailing the cost allocation method applied to expenses shared by a CSC Leon-funded program and other programs or operations paid with other funds.
- h. Rosters corresponding to admission fee/ticket purchases for field trips; total amount paid and the total tickets purchased must match.
- i. Employee Reimbursement Forms for out-of-pocket expenses.

For other forms of documentation not listed, confer with CSC Leon staff.

Guidance Relating to Disbursements

- All documentation must be legible and should be organized in a manner that provides an audit trail from the payment to the amount expensed. When the amount of the payment is different from the expense requested, submitting supporting schedules or notes are the sole responsibility of the CIP to show a clear audit trail (example: submitted documentation shows CIP staff person's salary charged at 60% of their salary, but approved budget shows CSC Leon funds to be used for 100% of their compensation, the CIP is responsible for correcting the mistake, or returning the unused 40%).

- Quarterly program reports should only include the share of costs funded by CSC Leon. Charges should show a prorated share of the program expense paid by CSC Leon to the total office operation.
- CSC Leon expects it's funding to be used to help keep the program operational for the full contract year. Funding within salaries and FICA line items should be used at a rate in proportion to the number of months of operation and the frequency for which expenses are paid.
- Expenses incurred on behalf of employees are restricted to those positions funded by CSC Leon. For example, fringe benefit expenses and travel expenses can be paid with CSC Leon funds only for those employees funded by CSC Leon. Additionally, such expenses can only be paid at the percentage of the position for which CSC Leon funds. For example, if CSC Leon Funds 50% of a position, only 50% of fringe benefit and travel expenses can be paid with CSC Leon funds. Please mark supporting documentation to show the percentage allocated to CSC Leon.
- Equipment purchased with CSC Leon funds is intended for use by the funded program or program(s). Should a funded program not continue for two years beyond the contracted period in which the equipment was purchased, said equipment will be considered the property of CSC Leon. CSC Leon reserves the right to re-distribute unused equipment to functioning CSC Leon-funded programs at CSC Leon's sole discretion.
- Receipts/invoices are required for ALL expenses submitted to CSC Leon and should clearly indicate vendor name and the date of purchase. Please include copies of cancelled checks to document that the expense has been paid by the funded investment partner.
- For receipts/invoices that include items not being requested for reimbursement, please circle, or underline the items considered for reimbursement.
- Sales tax should be deducted from expenses where the tax should not have been charged/paid. Remember to use your tax-exempt certificate when applicable! If you are tax-exempt, CSC Leon will not pay for sale tax charged.
- Purchases made with a company credit card must be requested in the quarter the credit card is paid and support documentation should include the statement in addition to receipts/invoices.
- Please redact all Social Security numbers from documents submitted to CSC Leon.
- Employee reimbursement for their out-of-pocket expenses should be documented appropriately on a formal Employee Reimbursement Form. This form should be included as support documentation.
- Late, overdraft, interest fees are not eligible for payment by CSC Leon and will be charged back to the CIP.

Method of Payment

After CSC Leon Fiscal review and approval, CSC will initiate payment by direct deposit. Payment will be initiated within 21 days of receipt of the complete Quarterly Reporting. Note that incomplete or incorrect reporting that must be submitted or revised and re-submitted BY THE CIP will be paid within 21 days of receiving the properly submitted request.

RECORD-KEEPING and ON-SITE VISITS

Maintenance of Books and Records - CIP Responsibility

It is the responsibility of the CIP to:

- Maintain books, records, and documents (including electronic storage media) in accordance with standard accounting procedures and practices that reflect all payments by CSC Leon to the CIP under the executed contract between CSC and the CIP.
- Assure that records pertaining to the contract between CSC Leon and the CIP, including all financial records and supporting documentation, be available at all reasonable times and upon reasonable prior request, for inspection, review, or audit by CSC staff or other personnel assigned by the Council.
- Maintain and file with CSC Leon in a timely manner all fiscal reports related to services under the contract between CSC Leon and the CIP.
- Maintain and file with CSC Leon in a timely manner all program reports related to services under the contract between CSC Leon and the CIP. Failure to submit these reports in a timely manner will result in a late fee assessment.

On-Site Visits

CSC Leon Staff will conduct on-site visits to all CSC Leon-funded programs during the contract period. Visits will be conducted at a minimum on a bi-annual basis, with the exception of summer bridge programs that will receive only one. During the on-site visit, monitoring will be conducted based on the quarterly reporting provided; any issues or concerns with quarterly reporting can be discussed during this time. CSC Leon staff will take the opportunity to observe the program facility and activities to develop a thorough understanding of the services being rendered by the program.

Community Investment Partner Funding Policy

Definitions

Acquisition – Taking ownership of property, receiving the property as a gift, entering a lease-purchase arrangement or leasing the property. The term includes processing, delivery, and installation of property.

Acquisition Cost – For equipment, the net invoice unit price of the property including the cost of modifications, attachments, accessories, or auxiliary apparatus necessary to make the property usable for the purpose for which it was acquired. Other charges, such as the cost of installation, transportation, taxes, duty, or protective in-transit insurance, shall be included or excluded from the unit acquisition costs in accordance with the provider's regular accounting practices.

Administrative Cost – All direct and indirect costs associated with the management of community investment programs.

Administrative Requirements – The general practices that are common to the administration of the community investment (grant)/program, such as financial management and accountability, reporting, equipment management, and retention of records. These are distinguished from "programmatic" requirements, which concern matters that can be treated only on a program-by-program basis.

After-Action Report – A detailed critical summary or analysis of a past event or activity, created to re-assess decisions and consider possible alternatives for future scenarios.

Allowable Cost – Expenditures that are specifically permitted (or not specifically prohibited), by law, regulation, or guidance from the CSC Leon, federal accounting standards, or other authoritative sources. The cost incurred is reasonable; necessary; allocable; conforms with any limitations or exclusions set forth in the federal or state cost principles or in the award notification as to the type or amount of cost; consistent with regulations, policies, and procedures; accorded consistent treatment as a direct or indirect cost; determined in accordance with generally accepted accounting principles; and not included as a cost in any other award.

Approval or Authorization – Official documentation to show evidence of consent for a specific request.

Approved Budget – The financial plan for expenditure for a community investment-supported project, program, or activity.

Attestation – A written statement submitted by an applicant, normally included with an application, indicating that the applicant, if funded, will abide by specific requirements.

At-Hope - Neighborhoods or community populations that have historically been underserved or under-resourced.

Audit – An independent financial and/or performance review of any public or private person or organization entrusted with public resources. The review is to attest that the recipient was responsible in applying those resources efficiently, economically, and effectively to achieve the purpose for which the resources were awarded.

Audit Resolution – The process of resolving audit findings, including but not limited to, those related to management, and systems deficiencies and monetary findings (i.e., questioned costs).

Award – The document that states CSC Leon has approved for community investment funds to be provided to a recipient to carry out an approved program or project (based on an approved application).

Best Value - The expected outcome of a purchase that, in CSC Leon's estimation, provides the greatest overall benefit in response to CSC Leon's requirements.

Board of Directors – An organized body of advisors with oversight responsibility.

Budget – The applicant's financial plan, with accounts and amounts showing use of funds for carrying out project objectives, services, or activities as detailed on the budget narrative.

Budget Period – An interval of time (usually 12 months) during which a project period is divided for budgetary and funding purposes.

Carryover – Unobligated funds remaining at the end of any budget period that may be authorized by CSC Leon to carry forward to another budget period to cover allowable costs of a project that will continue under the same project award into a subsequent budget period in the next fiscal year. Obligated, but not liquidated, funds are not considered carryover.

Commingling – To deposit or record funds in a general account without the ability to identify each specific source of funds for any expenditure. Under this general definition, commingling of CSC Leon funds with other funding is prohibited.

Competition – An objective review process in which applicants willingly participate, where the applications are evaluated against established review criteria, scored and rated accordingly.

Competitive Solicitation - A formal competitive process conducted to achieve a best-value outcome for CSC Leon, including, without limitation, an Invitation to Bid (ITB), a Request for Proposals (RFP), or an Invitation to Negotiate (ITN), as described in chapter 287, Florida Statutes, and implementing regulations.

Community Investment – Award of financial assistance, including cooperative agreements in the form of money, by CSC Leon to an eligible entity.

Community Investment Award Notification – An official binding document signed by the authorized official of the awarding agency. The award notification outlines all the terms and conditions of the grant award.

Community Investment Partner (CIP) – A community agency, entity or organization seeking a financial award from CSC Leon County.

Community Investment Period – The time frame during which allowable activities and disbursements may be allowed for a program/project.

Cone of Silence – The period (number of days) between the date a procurement (RFP/ITN/RFA) is advertised and the date the corresponding recommended award (or procurement cancellation) is scheduled to be announced. The Cone of Silence is designed to protect the professional integrity of the procurement process by shielding it from undue influences prior to the recommendation of contract award. During the silence period, no one acting on a Respondent's behalf may engage in any written or verbal communication or other attempts to influence anyone at CSC Leon, or its representatives, regarding the procurement.

Contract – Any written agreement between two or more parties as a legal instrument by which an entity purchases property, goods or services needed to carry out the project or program.

Contact Person – The representative for the program, who may also serve as the program administrator or Community Investment Partner Officer.

Continuation Project – Written authorization to continue an approved project that may or may not provide additional funding for a subsequent budget period.

Contracted Services – A written agreement between a recipient and a third party to acquire goods and/or services.

Cost – An amount paid or to be paid as determined on a cash, accrual, or other basis acceptable for a purchase.

Cost Allocation Plan – Document that identifies, accumulates, and distributes allowable direct and indirect cost to cost objectives. The plan also identifies the allocation methods used for distribution of cost objectives, on the basis of relative benefits received.

Cost Sharing or Matching – The value of the third party, in-kind contributions, and the portion of the costs of a project or program not funded by CSC Leon.

CSC Leon – The Children’s Services Council of Leon County (CSC Leon) is a catalyst for positive change to improve the lives and outcomes of children and families in Leon County. It was established **by voters in November 2020** to help provide various services to children and youth, such as early learning and reading skills, youth development, physical and mental treatment, preventative and other services. As an independent special district authorized by section 125.901, Florida Statutes, CSC Leon will provide funding for these children's services throughout the County by annually levying ad valorem taxes, not to exceed the maximum millage rate of one-half (1/2) mill.

Data – Specific information or facts that are collected, such as date of entry into a program, age, or reading level. Sources of data may include attendance records, referrals, assessments, or interviews. A data item is usually a discrete or single measure.

Deadline Date – The receipt date by the funder for an application to be considered for funding.

Deliverables – Products and/or services that directly relate to a task specified in the program/project. Deliverables must be quantifiable, measurable, and verifiable. Deliverables in most cases are events that trigger payments and are used as verification that services have been rendered in accordance with program/project requirements.

Direct Cost – Cost that can be identified specifically with a particular final cost objective.

Disallowed Cost – Charges to a project or program determined to be unallowable, in accordance with the applicable federal or state cost principles or other terms and conditions contained in the award.

Disbursement – Payment made in cash, by check or electronically from a dedicated fund for goods and/or services.

ELC – Early Learning Coalition a private not-for-profit organization that provides services to families, children and childcare providers.

Electronic Invoice - An invoice that is issued, transmitted, received, processed and stored electronically using specified document formats.

Equipment – A tangible item that is functionally complete for its intended purpose, durable, nonexpendable and needed for the performance of a contract.

ESEA – Elementary and Secondary Education Act.

Evaluation – The systematic collection of information about a program/project to answer important questions about activities, barriers, characteristics, and outcomes of a program/project.

Expenditures (Outlays) – Charges made to the project or program that may be reported on a cash or accrual basis. For reports prepared on a cash basis, outlays are the sum of actual cash disbursement for

direct charges for goods and services, the amount of indirect expense incurred, the value of in-kind contributions applied, and the amount of cash advances and payments made to contractors and sub-grantees. For reports prepared on an accrued expenditure basis, outlays are the sum of actual cash disbursements; the amount of indirect expenses incurred; the value of in-kind contributions applied; and the new increase or decrease in the amounts owed by the grantee for goods and other property received, for services performed by employees, contractors, sub-grantees, subcontractors, and other payees; and other amounts becoming owed under programs for which no current services or performance is required, such as annuities, insurance claims, and other benefit payments.

Expiration Date – The date specified in the project award notification signifying the end of the current budget period, after which the recipient does not have authority to obligate funds.

Federal Employer Identification Number (FEIN) – Also known as the Employer Identification Number, the EIN is a nine-digit number assigned by the Internal Revenue Service to Business entities operating in the US. An organization/entity may apply online at [http://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Apply-for-an-EmployerIdentification-Number-\(EIN\)-Online](http://www.irs.gov/Businesses/Small-Businesses-&-Self-Employed/Apply-for-an-EmployerIdentification-Number-(EIN)-Online)

Fiscal Year –

- Federal fiscal year – a period beginning on October 1 and ending on the following September 30.
- State fiscal year – a period beginning on July 1 and ending on the following June 30.

Fixed Charges – Contributions of the CIP to fringe benefits and similar costs, but only those associated with salaries and wages that are charged as indirect costs, which include: (a) retirement, including state, county or local retirement funds, Social Security, and pension payments; (b) unemployment compensation payments; and (c) property, employee, health, and liability insurance.

For-profit – The term applying to an agency, organization, institution or other entity that is owned and operated with a primary goal to make a profit or earn income. Additionally, the owners earn income from the entity and may also pay shareholders and investors from the profits.

Funding Cycle – The sequence of activities for awarding a project which may include the announcement of availability of funds; deadline for submitting an application; review and approval process; and the method and timelines for the release of funds.

Funding Priorities – Specific initiatives CSC Leon requires to be in an application in order to be considered for funding. Priorities may be generated based on requirements or a specific area or activity on which a program is focusing.

Generally Accepted Accounting Principles (GAAP) – The generally accepted auditing standards issued by the American Institute of Certified Public Accountants (AICPA).

Government – A federal, state, or local government or a federally recognized Indian tribal government.

Guidelines – Procedures outlined in a document that should be followed as specified.

In-Kind Contributions – “Third party in-kind contributions” means the value of non-cash contributions provided by non-federal third parties. Third party in-kind contributions may be in the form of real property, equipment, supplies, and other expendable property, and the value of the goods and services directly benefitting and specifically identifiable to the project or program.

Independent Auditor – A certified public accountant (CPA) or chartered accountant (CA) who examines the financial records and business transactions of an entity with which they are not affiliated.

Indirect Cost – Cost incurred for a common or joint purpose benefiting more than one cost objective and not readily assignable to the cost objectives specifically benefited without effort disproportionate to the results achieved.

Indirect Cost Rate Agreement – A formal written and signed agreement between an organization and its respective cognizant agency that specifies the treatment of indirect costs based on an approved plan.

Internal Control – A plan of organization under which employees’ duties are so arranged, and records and procedures so designed, as to make it possible to exercise effective accounting control over assets, liabilities, revenues, and expenditures.

Invitation to Negotiate (ITN) – A flexible procurement process that is used for highly specialized, variable services and commodities.

LEA (Local Educational Agency) – A public board of education or other public authority legally constituted within a state for either administrative control of or direction of, or to perform service functions for, public elementary or secondary schools in a city, county, township, school district, or other political subdivision of a state; or such combination of school districts or counties a state recognizes as an administrative agency for its public elementary or secondary schools.

Matching Funds – A type of cost-sharing typically used when the contractor requires the community investment partner to match contract funding in accordance with a specified ratio.

Monitoring – CSC Leon County activities that ensure that funds are used, and programs are operated in accordance with applicable contract requirements and regulations. The assessment process may include, but is not limited to, reviewing information gathered from various required reports, audits, site visits, and other sources.

Memorandum of Understanding (MOU) – An agreement developed and executed among parties that specify roles in a joint operation.

Non-profit/Nonprofit – An agency, organization, institution or entity that is owned and operated by one or more corporations or associations whose net earnings do not benefit, and cannot lawfully benefit, any private shareholder or entity.

Not-for-profit – An agency, organization, institution or entity that is owned and operated to serve the goals or special interests of its members. Money generated by not-for-profits must be reinvested back into the operation of the organization.

Objective – A specific statement that explains how a goal will be measured, accomplished, and analyzed.

Obligations – The amounts for orders placed, contracts awarded, goods and services received, or similar transactions during the stipulated project period that will require payment during the same or a future period.

Online Announcement Service - One or more web-based services providing announcements of contracting opportunities (e.g., Florida Administrative Register, DemandStar, etc.).

Organization – A group of people organized to accomplish a common goal or set of goals.

Partnerships – Organizations that help each other meet their respective or common goals, without making substantial changes in the services they provide.

Performance Funding – Funding based on the timely submission of deliverables according to the specifications negotiated between CSC Leon and the Community Investment Partner.

Performance Indicators – A target level of performance expressed in measurable terms, against which actual achievement can be compared.

Performance Measures – A characteristic or metric that can be used to assess the performance aspects of a program or project.

Performance Report – A report of the specific activities that the recipient completed based on an approved project/program agreement.

Post-Test – A test or measurement taken after a program, project, service, or intervention takes place. It is compared with the results of a pre-test to demonstrate the effects or changes as a result of the program, service, or intervention being evaluated.

Pre-Test – A test or measurement taken before a program, project, service, or intervention begins. It is compared with the results of a post-test to demonstrate the effects of the program, service, or intervention being evaluated. A pre-test can be used to obtain baseline data.

Prior Approval – Documentation evidencing consent prior to incurring specific costs.

Private, Non-profit Organization – An agency, organization, or institution, not under federal or public supervision or control, that is owned by one or more individuals, partnerships, corporations, or associations whose net earnings do or can benefit any private shareholder or entity.

Program – The services or activities that an agency agrees to provide for a specified period of time using state or federal funds awarded to a project recipient.

Program Application – An entity's written and submitted request for a program award from CSC Leon.

Program Award Notification – An award of funding issued by CSC Leon to an eligible recipient. The document specifies the amount of funds awarded the program period, and any special requirements or restrictions to be imposed along with other requirements of the award.

Program Period – The length of time for which a project has been financially and programmatically authorized.

Program Recipient (Community Investment Partner) – see Community Investment Partner (CIP).

Purchasing Official - The individual responsible for CSC Leon's administration of the purchasing process.

"Readiness" of Applications - The preparedness of a community investment partner to have the knowledge, skill set and support to successfully write a high-quality service proposal with all required elements.

Request for Applications (RFA) - A submission for program funds used in non-competitive programs.

Request for Information (RFI) – A solicitation used to gather information from a potential supplier of a good or service.

Request for Proposals (RFP) - A solicitation generally used in seeking applications that are competitive.

Request for Quotes (RFQ) - A solicitation for goods or services in which a company invites vendors to submit price quotes and bid on the opportunity to fulfill certain tasks or projects.

Responsive Offer - An offer in response to a competitive solicitation that conforms in all material respects to the solicitation requirements.

Real Property – Considered land, including land improvements, structures, and appurtenances, but not movable machinery and equipment are considered real property.

Reasonable Cost – A cost whose nature or amount does not exceed that which would be incurred by a prudent person under the circumstances prevailing when the decision was made to incur the cost.

Response – A request for financial support of a project, program, or activity submitted in a specific format and in accordance with CSC Leon guidance.

Retention of Records and Access – Maintaining program/project paperwork shall be maintained for the periods prescribed by applicable state and federal statutes and rules (See “General Records Schedule for State and Local Government Agencies” at <http://dos.myflorida.com/library-archives/recordsmanagement/general-records-schedules/>.)

Roll-Forward – Unobligated balances of an award or project that are allowed to be continued in subsequent funding periods.

Set-Aside – Funds that are reserved for a specific purpose.

Special Taxing District – A “unit of local government,” according to the Florida Constitution created by the Legislature or another branch of local government, like a city or county, for a specific purpose. Children’s Services Council of Leon County (CSC Leon) is a special taxing district.

Statement of Work (SOW) – A document in which the contracting officer or procurement officer specifies the objectives and deliverables for a particular program or service contract.

Sub-grant – An award of financial assistance in the form of money made under a community investment (grant) by a CIP to an eligible sub-grantee. The term includes financial assistance when provided by contractual legal agreement, but does not include procurement purchases, nor does it include any form of assistance that is excluded from the definition of “community investment partner funding agreement.”

Sub-grantee – The Community Investment Partner (CIP) to which a sub-grant is awarded and that is accountable to the CIP for the use of the funds provided.

Sub-recipient – An entity that receives a sub-award from a CIP or another sub-recipient under an award of financial assistance to carry out a program and is accountable to the recipient or sub-recipient for the use of the funds provided by the sub-award.

Substantial Progress – A level of accomplishment that a CIP must make in its project during a budget period that produces measurable and verifiable evidence that the activities undertaken complied with those objectives contained in agreements between the CSC Leon and a CIP.

Supplies – An item of expendable nature that is consumed, worn out, or deteriorated in use.

Target Area – A geographic area, such as a city, county, school district(s), school service area, zip code(s), neighborhood(s) or certain census tracts.

Target Population – A designated group targeted to receive direct assistance.

Technical Assistance Plan – A tool to outline, track and report targeted support to an organization with a need or problem; an effective method for building the capacity of an organization.

Termination – Permanent withdrawal of the authority to obligate previously awarded community investment (grant) funds before that authority would otherwise expire. It also means the voluntary relinquishment of that authority by CSC Leon or sub-grantee of a CIP.

Terms of a CIP Funding or Sub-grant – All requirements imposed on a CIP or sub-grant, whether based on laws, policy, regulations, or other documents referenced in or specified in the project award notification. In addition to the general terms and conditions, the Project Award Notification may include other conditions that are considered necessary to attain the award's objectives.

Total Program Cost – The total allowable costs (both direct and indirect) incurred by the recipient to carry out a CIP-supported project. Total project or program costs include costs charged to the award and costs charged by the recipient to satisfy a matching or cost sharing requirement.

21st Century – A key component of the federal No Child Left Behind Act established to provide opportunities for academic enrichment, offer students a broad array of additional services, programs, and activities, and to offer families of students served by community learning centers opportunities for literacy and related educational development.

Unallowable Cost – A cost specified by law or regulation, federal or state cost principles, or in the terms and conditions of the award that may not be reimbursed under the project.

Unpaid Obligations – The amount of obligations incurred by the recipient that has not been paid (for financial reports prepared on a cash basis) or the amount of obligations incurred by the recipient for which an outlay has not been recorded (for reports prepared on an accrual basis).

Withholding of Payment – An action taken, after appropriate administrative procedures have been followed, that restricts a recipient's ability to access project funds.

POLICY: Data and System Security

Draft Presented 1-12-2023

Adopted _____

CSC Leon recognizes the importance of maintaining the security of data and technology resources required to operate the organization and provide accurate reporting on outcomes. All individuals who collect participant data, specifically that which contains personally identifying information (PII), should take reasonable measures to protect and secure it, both in written and electronic formats.

CSC Leon will be responsible for the following:

- Training administrators of Community Investment Partners (CIPs) on acceptable measures to ensure data security within their program(s).
- Limiting user access to only data that required to perform their specific job duties.
- Regularly auditing file access permissions.
- Implementing procedures to report data breaches or violations of security protocol.
- Educating program administrators on any new developments in data breach security.
- Implementing disposal standards for participant data no longer subject to be retained in accordance with CSC Leon policies nor Florida's public records law.

Administrators for CIPs will be responsible for the following:

- Communicating with CSC Leon, in writing, the names and positions of all persons who should be authorized to access data files and system modules within the CSC Leon Services & Activities Management Information System (SAMIS).
- Notifying CSC Leon of any change in personnel or their authorization to SAMIS.
- Training employees within CIPs on steps to take to ensure data security as part of their program duties.

All users of the CSC Leon SAMIS in any capacity will be responsible for the following:

- Reporting suspected or actual data breaches immediately to either the CSC Leon Special Projects Manager or Executive Director. Examples of the types of incidents to report include, but are not limited to:
 - Access to system data files or modules by unauthorized individuals;
 - Evidence of unauthorized access into a system containing private/confidential data;
 - Unauthorized sharing of login credentials;
 - Loss of a hardware resource such as laptop, tablet, cell phone, or removable data storage devices;
 - Hacking or defacing of an online resource within the information management system;
 - Documents containing private/confidential data sent in any form to a wrong recipient;
 - Employee misuse of authorized access to disclose or mine private or confidential data.
- Protect all data files and system modules by signing off the system or locking their equipment/office while unattended.

Activating Incident Response Team

Upon receipt of a suspected information security breach, the CSC Leon Special Projects Manager, Executive Director, or designee will immediately contact Webauthor and expeditiously conduct a fact-finding investigation to determine whether a data breach or compromise has occurred.

If the team determines there was a data breach, appropriate resources will work to contain the breach. Once the breach is contained and eradicated, the team will assess the extent and impact of the breach. Each step related to the breach and breach investigation will be fully documented.

The team will consult with legal counsel to determine specific legal obligations relating to the breached information and relevant reporting obligations such as:

- Family Educational Rights and Privacy Act (FERPA);
- Health Insurance Portability and Accountability Act (HIPAA);
- State of Florida laws;
- Federal laws including the Federal Trade Commission Act and Gramm-Leach-Bliley Act;
- Any relevant contractual obligations

If a data breach compromise protected personal information of over 500 individuals in the State of Florida, CSC Leon must inform the Florida Department of Legal Affairs as well as each affected or likely affected resident within 30 days of the breach. Additionally, CSC Leon in collaboration with Webauthor, will be required to make certain materials available to the state government upon request, such as remedial procedures, incident reports, and computer forensic.

Authorized Users and Passwords

Authorized users of CSC Leon's technology resources shall have passwords to authenticate their identity and provide access to the appropriate systems. Authorized users include CSC Leon team members and specific individuals within funded programs.

- A. Appropriate persons may be properly authorized to access information management system data files and system modules, only if such operation is clearly a part of, or directly related to, the administrative workload of that individual. In all cases they must be properly authorized (i.e. have a signed and approved security user-id agreement) when access is permitted.
- B. Program participants, volunteers and non-program staff should not be provided access to confidential information management system data files and system modules. Any exception will require prior approval of CSC Leon.
- C. CSC Leon shall supply each duly authorized user with a unique user identification code and password to enable the user to sign on to the network.
- D. All users will be required to update system passwords at least once every sixty (60) days. Passwords will be assigned by the information management system so that no one can find a password in the system. If a password is forgotten a valid member can use the built-in tools to have a new, temporary password mailed to their valid member E-mail address and then using the temporary password they can log into the site and select a new password that is then

hashed in the system. This and other measures that are built into “User/Member Administration” assure the highest level of application-level security. Multi-factor authentication may be required. Training for program administrators and data entry staff will be provided by CSC Leon.

E. CSC Leon minimum secure password requirements are:

1. Passwords will be at least eight (8) characters, with three (3) out of four (4) of the following conditions met:
 - a. must contain an uppercase letter;
 - b. must contain a lowercase letter;
 - c. must contain a special character;
 - d. must contain a number.
2. The password should be changed on a regular basis and at least once every sixty (60) days where there is significant risk relating to personally identifiable confidential information being accessed.
3. Screen saver and session time-outs and monitor orientation should be set to preclude casual screen viewing by others.

F. It is a violation for any person to disclose any assigned password to any other person, except to a member of the Webauthor team or their designee, for problem resolution purposes. It is the responsibility of each user to whom a password is assigned to maintain the confidentiality of the password. Under no circumstances shall passwords be posted or kept in a place that is accessible to unauthorized persons.

G. In general, users shall not be given access to system development and productivity tools. Specific exceptions may be made which may place additional restrictions on such access on an individual basis. Unauthorized access to program libraries and program development tools shall be considered a violation.



**Children's Services Council of Leon County
Summer Learning 2023 Funding Opportunity
Program Application Overview**

The Children's Services Council of Leon County (CSC Leon) is a catalyst for positive change to improve the lives and outcomes of children, youth, and families in the local community. Established as an independent special district by the voters of Leon County in 2020, CSC Leon provides funding through ad valorem taxation to organizations that increase school readiness, provide school-age supports and reduce juvenile crime; improve child physical and mental health, while reducing adverse childhood experiences; and provide youth development opportunities, increase food and housing stability, and support caregivers. At its core, CSC Leon seeks to make funding decisions based on the following values: inclusive, data-driven, equitable, collaborative, and innovative. By funding and making available prevention and early intervention services while using a results-based accountability framework, CSC Leon's ultimate goal is to ensure all children and youth in Leon County are socially, emotionally, and physically equipped to reach their full potential.

I. OVERVIEW

CSC Leon seeks to issue program funding to expand the capacity of programs to better meet specific needs of children, youth, and families in Leon County during the summer of 2023, specifically in the areas of child and youth development and food insecurity. Additional funding opportunities to support implementation of new programs or sustained support for existing programs are planned for the near future and may include additional family support services (e.g., expanded access to mental health, childcare, etc.). This round of summer funding is expected to be issued on May 15, 2023, and be expended by August 30, 2023. Funded entities will be required to secure minimum levels of insurance, certify background clearance for all staff and personnel working directly with children and youth, collect and enter data on program participants using prescribed tools, and submit detailed financial reports. Funded entities will be required to use the CSC Leon Services and Activities Management Information System (SAMIS) on a weekly basis. Any CSC Leon funds not expended by August 30, 2023, must be returned along with a detailed Final Report.

II. SUMMER LEARNING FUNDING INTENT

CSC Leon is seeking proposals to expand access to quality school-age summer learning programs. Its goal is to promote positive youth development and reduce juvenile crime by providing safe and enriching environments for children and youth throughout the summer months. Investments in summer learning align with the CSC Leon's priority of "Success in School & Life" by promoting school readiness and providing school-age supports.

These funds are designed to **expand** services, and **not** pilot or test new programs due to the required start up time needed to successfully implement a new program. Proposals **can** include enhancements to existing programs but **cannot** be limited to enhancements only.

Entities can apply for both summer 2023 funding opportunities but must not supplant existing resources nor request funds for the same line items across requests.

Training and technical assistance will be provided to all funded entities to ensure program success and accountability.

III. ELIGIBILITY

Any entity legally authorized to conduct business in the State of Florida is eligible to apply for this funding. In the case of a tie between entities, preference will be given to not-for-profit entities with a current IRS determination status. Entities currently receiving funding from other community funding partners are eligible to apply for funds, but CSC Leon funds may only be used to expand services and not supplant or duplicate funding for existing services. *For example, if an entity receives funding from another agency to support 10 slots for childcare and the program has need for an additional 10 slots, then that application could be accepted for consideration.*

IV. APPLICATION PROCESS

(to be entered after meeting with Webauthor)

V. SCOPE OF WORK

A. Background/Rationale

The CSC Leon Needs Assessment (2022) identified affordable and accessible summer programming as an existing gap in services. The same report also identified funding innovative, high-quality summer programs as a viable opportunity to impact the following baseline data points:

- 3rd Grade Reading – 54% (2022)
- 8th Grade Math – 29% (2021)
- Juvenile Crime – 18.9/1,000 (2020-2021)
- Childhood Food Insecurity – 21.2% (2020)

National research suggests summer learning programs have the potential to enhance positive youth development when they include a combined focus on academic, physical, and enrichment activities. Benefits include the reduction of risky behavior, promotion of 21st century skills, and mitigation of summer learning loss. This is especially true of children from low-income families who might not otherwise have access to educational resources and enrichment activities throughout the summer. However, not all summer learning programs are effective in improving desired outcomes. Studies show the following characteristics of summer learning programs yield the most positive results.

1. Smaller Child Ratios – at most 20 children per staff member, 15 recommended
2. Differentiated Instruction – individualized instruction and support for children yield positive outcomes

3. High-Quality Instruction – integrate certified teachers into program or provide professional development and coaching for existing staff to improve instruction in summer learning programs
4. Blend Academic Learning with Engaging Activities – provide children with engaging and enriching opportunities for hands-on activities and project-based learning, opportunities for student autonomy and choice, positive social relationships, and skill-building.
5. Encouraging & Supporting High Attendance Rates – maximize attendance by addressing key factors impacting attendance such as transportation, full day of programming (8 a.m. – 6 p.m.) five days a week, engaging activities blended with academic content
6. Appropriate Duration of Program – the longer children engage during the summer (6 consecutive weeks, recommended 8), the more likely they are to have positive achievement outcomes the next year.
7. Parental Involvement – increased buy-in from parents leads to increased attendance and greater incorporation of learning strategies into the home
8. Effective Evaluations – ensures programs continuously and successfully integrate key elements of effective summer programs

B. Required Proposal Elements

B.1 Organizational Profile

All entities submitting a proposal are required to complete an organizational profile that will include, at minimum, the following:

1. Primary applicant name and contact details
2. Total amount requested
3. Brief overview of applicant entity including vision, mission, and history of service.
4. Brief overview of applicant leadership (background and resume of program administrator and primary program manager if different from administrator)
5. Organizational Chart (if proposal includes the addition of new staff, indicate this clearly on the chart)
6. Current Division of Corporations Business Registration
7. Current IRS Nonprofit Status Determination Letter, if applicable
8. Current Certificate of Insurance/Proof of Liability Coverage
9. Most recent annual budget, profit/loss statement, or 990 filing.

In addition, programs are encouraged to submit up to three letters of support from community partners and/or previous participants.

B.2 Proposal Design

Proposals for Summer Learning are required to show evidence of the following:

1. Funds must be used to expand services, and not pilot or test new programs. Proposals may include enhancements to existing programs but cannot be limited to enhancements only.
2. Programs must identify the percent of CSC funded slots that will be prioritized for children and youth who live in the targeted zip codes of 32301, 32303, 32304, 32305, and 32310. Programs that are located in these targeted areas will receive higher points.
3. Programs must be offered to families for free or very low cost. If fees are charged, a detailed explanation of what the fees cover must be included in the proposal.
4. Programs must demonstrate sufficient duration and dosage:

- a. Operate at least four consecutive weeks (six or more preferred). If offered in increments, please explain why. Partial points may be awarded.
 - b. Operate at least four days a week with higher points awarded for five-day a week programs.
 - c. Offer full-day supervision of at least six hours per day.
5. Programs must provide appropriate supervision demonstrated by a “staff to student” calculation and appropriate background screening. The employment of certified teachers is not required but will receive higher points.
6. Programs must include the provision of balanced nutrition to all program participants on all program days. Proposals must include a sample menu with higher points awarded for programs who offer multiple meals each program day.
 - a. Programs should identify the source and costs of the food provided (e.g., Summer Break Spot, Elder Care Services, private caterer, etc.)
 - b. Programs who desire to add another feeding component separate from their summer learning program (e.g., food lockers/pantry, backpack program, etc.) should apply under the summer 2023 funding opportunity: Summer Feeding.
7. Programs must include a sample weekly schedule of activities demonstrating at least 60% of time is spent in structured activities, with a preference for blended learning. Programs that include an academic component will receive higher points.
 - a. For programs working with elementary school-aged populations, literacy instruction is recommended as part of learning components.
 - b. For those programs working with teenagers, in addition to learning components, career exploration and/or job readiness skills are encouraged.
8. Proposals must include a “cost per child per week” calculation.
9. Proposals must demonstrate capacity to market and recruit the expected number of participants.
 - a. Budget requests can include funding for marketing materials.
10. Proposals must demonstrate capacity to adhere to the data collection requirements and corresponding performance indicators as listed below.
 - a. Budget requests can include funding for data collection and entry.
11. Proposals must demonstrate capacity to adhere to the reporting requirements listed below.

B.3 Proposal Budget

Entities submitting a proposal for Summer Learning are required to submit a project budget that is separate from their regular budget. It will include specific line items that must correspond to a written narrative matching the “Community Investment Partners (CIP) Fiscal Guidelines” available on the CSC Leon website: [INSERT URL](#). Entities will be required to develop their budget in the SAMIS portal. Uploads will not be accepted.

C. Data Collection Requirements

Entities selected for Summer Learning are required to collect and report the following from all program participants. All data must be input into SAMIS. Tools and training will be provided.

1. Basic demographic details for all children served including zip code and school.
 - a. Programs will be required to gather demographic data to help CSC Leon better understand the types of families accessing services including age, grade, race, gender, zip code, school.
2. Daily attendance (uploaded at least weekly)

- a. Research shows that higher attendance rates correlate with higher program quality and that participants with higher attendance have better short- and long-term outcomes. Programs will be required to track daily attendance and upload in the CSC Leon database at least weekly. An online module for tracking attendance and training will be provided to all funded programs.
3. Parent/Caregiver consent to release/deny student performance records be shared with/from Leon County Schools (using CSC Leon provided form)
 - a. Children who participate in high-quality summer enrichment opportunities experience greater academic retention than those children who do not. In partnership with Leon County schools, CSC Leon plans to create a baseline measure of summer academic retention for children who attend CSC Leon-funded programs in hopes of mitigating the “summer slide” in future funding cycles.
4. Parent/Caregiver Satisfaction (using CSC Leon provided questionnaire)
 - a. To contribute to CSC Leon’s composite picture of program quality, providers will be required to administer a short parent satisfaction survey to identify both program strengths and areas for improvement. Results will be accessible by the program to help improve quality and better meet the needs of families in the future.
5. Student Strength Pre/Post Assessment (using CSC Leon provided questionnaire)
 - a. Programs will be required to administer a brief pre- and post-test assessment to measure students’ noncognitive gains resulting from their summer program experience. Assessment tools as well as necessary training will be provided after award notification.
 - i. For programs working with elementary school-aged populations, the tool will be administered with parents.
 - ii. For those programs working with teenagers, a different tool will be administered with students.

D. Performance Indicators

Entities selected for Summer Learning will collect data to meet the following process measures and outcomes. These will be calculated by the data input into SAMIS.

1. 100% of program participants’ parents/caregivers will complete the Parental Consent Form
2. 95% of program participants will complete a Student Strength Pre-Assessment within first week of participation
3. 80% of program participants who completed a Student Strength Pre-Assessment will complete the Post-Assessment at the conclusion of the program (at least four weeks later)
4. 70% of program participants will attend at least 80% of the available days offered by the program
5. 90% of program participants’ parents/caregivers will report satisfaction (satisfied or very satisfied) with the program.

E. Reporting Requirements

Entities selected for Summer Learning will provide the following regular reports through a standardized template in SAMIS.

1. Weekly Attendance Reports including demographic data of children and youth served will be required two business days after the conclusion of the last day of the previous week.
2. A “Mid-summer Report” is required by July 10. The report shall include, at minimum, a brief narrative, status report on data collection efforts including attendance, aggregate results from

pre-assessment surveys as applicable, and overview of expenditures through June 30. Additional elements may be required.

3. A "Final Report" is required by September 15. The report shall include, at minimum, a complete program narrative, final attendance records, aggregate results from pre and post assessments including preliminary analysis highlighting specific observations, aggregate results from the Family Satisfaction Survey, and a detailed expenditure report. Unspent funds are required to be returned no later than September 30 to avoid fines or exclusion from future funding opportunities.

VI. ADDITIONAL REQUIREMENTS

Entities selected for either service line will be expected to do the following:

A. Insurance

The program provider shall procure and maintain for the duration of the program insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Provider, its agents, representatives, employees, or subcontractors. The cost of such insurance shall be the sole responsibility of the Provider.

The program provider shall also provide adequate liability insurance coverage on a comprehensive basis and to hold such liability insurance at all times during the provision of services. Upon contract signing, the Provider shall furnish CSC Leon with a current Certificate of Insurance listing CSC Leon as the Certificate Holder and an Additional Insured with respect to general liability and automobile liability (if applicable),

If children or youth will be transported by, or on behalf of, the program provider, whether in Provider owned, rental, or non-owned vehicles, the Provider must comply with the following requirements:

1. All drivers must have a valid driver's license with the appropriate class certification (if applicable). A copy of each driver's license must be on file with the Provider.
2. All vehicles must be insured with a minimum coverage of \$1,000,000.
3. A transportation permission form must be signed by the parent or guardian of each child being transported. A copy of each form must be on file with the program provider.

B. Financial Management

The program provider must comply with the accounting principles and procedures outlined in the Financial Accounting Standards Board, Statement of Financial Accounting Standards 116 and 117, and This means the program provider must have and utilize adequate internal controls and maintain necessary source documentation for all costs incurred.

C. Site Visits and Mandatory Training

All program providers are subject to monitoring and quality site visits throughout the contract period. During a prearranged monitoring visit, a CSC Leon team member will request access to specific items that may include personnel files for all CSC-funded staff (paid and volunteers) including completed background checks, organizational policies, program files, insurance certificates, back up of expenditures, payroll, etc. A checklist of required items will be provided at least 24 hours in advance of a scheduled visit.

All program providers will be required to attend training on the relevant data collection tools and the data collection system, SAMIS, before any funds are dispersed. These trainings will be offered in person and virtually.

D. Data Security

Recipients of CSC Leon funds are reminded of their vital responsibility to protect sensitive and confidential data, and take all reasonable and appropriate actions to prevent the inadvertent disclosure, release or loss of sensitive personal information. CSC Leon advises that personally identifiable, sensitive, and confidential information about CSC Leon-supported programs or program participants not be housed on portable electronic devices. If portable electronic devices must be used, they should be encrypted to safeguard data and information. These devices include laptops, CDs, disc drives, flash drives, etc. Programs also should limit access to personally identifiable information through proper access controls such as password protection and other means. Program data should be transmitted only when the security of the recipient's systems is known and is satisfactory to the transmitter.

VII. EVALUATION PROCESS

A. COMMUNITY IMPACT PANEL

All proposals will be reviewed by members of a local community impact panel. These are volunteer community members appointed by CSC Leon. All volunteers are residents of Leon County who have a vested interest in the success of children, youth, and family services, and in the fiscal responsibility of the Council.

Volunteers will score proposals independently after receiving detailed instructions and training. Scoring criteria will follow the outline listed below. Volunteers will determine the score for each section based on review of all subsections for that specific section. Scores will be discussed at a public meeting of the volunteers before becoming final and prior to CSC Leon making its final funding determination for summer 2023.

B. SCORING CRITERIA

1. Relevant Experience & Relationships – up to 20 points

Volunteers will use items reported in the proposal organizational profile and design sections to evaluate the following:

- a. The applicant provides evidence that the program will be led by an organization and individuals with the relevant experience, past performance, and qualifications needed to aid in the program's success.
- b. The applicant is registered to conduct business in Florida and all required documentation is current and included with the proposal.
- c. The applicant demonstrates established relationships with community stakeholders.

2. Proposal Narrative – up to 50 points

Volunteers will use items reported in the proposal design and budget sections to evaluate the following:

- a. The applicant provides evidence that the proposal is an expansion of services and will serve children and youth in specific neighborhoods identified by CSC Leon.
- b. The applicant demonstrates a thorough understanding of expected program duration and dosage evidenced by its schedule.

- c. The applicant demonstrates a thorough understanding of quality programming standards as evidenced by its activities schedule.
- d. The applicant demonstrates a thorough understanding of nutritional standards as evidenced by its meal plan.
- e. The applicant has or will have the sufficient personnel/professional staff experience to carry out the proposed program, including meeting marketing, data collection and reporting expectations.
- f. The applicant offers a competitive value as evidenced by its “cost per child per week” calculation.

3. Budget – up to 30 points

Volunteers will use items reported in the proposal organizational profile and budget sections to evaluate the following:

- a. The applicant provides a complete, cost-effective budget that aligns with the proposal design.
- b. The applicant provides evidence that the amount requested does not supplant existing funds.
- c. The applicant provides evidence of financial stability.

C. PROPOSAL PRESENTATION

Entities submitting a proposal for Summer Learning will be invited to provide a 20-minute presentation outlining their proposal and answering specific questions from the review panel. The exact date, time, location and format will be provided upon successful submission of a proposal (i.e., submitting on time, meeting eligibility requirements, and including all required elements).

VIII. TIMELINE

Activity	Date	Time
Release Funding Announcement	Monday, February 6	By 5:00 p.m.
Informational Session (Application Portal via Webinar)	Wednesday, February 15	At 3:00 p.m.
High-Quality Summer Learning Programs Training (In-person)	Wednesday, February 15 and Tuesday, February 21	At 10 a.m. and 2 p.m.
Q&A Submission Deadline	Monday, February 20	By 5:00 p.m.
Q&A Response Posting	Wednesday, February 22	By 5:00 p.m.
Proposal Deadline	Wednesday, March 22	By 5:00 p.m.
Provider Presentations	Monday-Wednesday, March 27-29	varies
Public Meeting to Discuss Scores	Wednesday, April 5	10:00 a.m.
Public Meeting to Select Final Proposals	Thursday, April 20	4:00 p.m.

IX. NOTIFICATION OF AWARD

The CSC Leon Governing Council will make the final determination of funding for any and all applicants based on the scoring provided by the local community impact panel. Applicants selected for funding will be notified on Friday, May 20, 2022, to discuss the contracting and billing process. Additional documentation may be required.

Since CSC Leon expects to receive a high volume of funding proposals, applicants are advised that CSC Leon may not be able to cover all funding requests, nor be able to fund the full amount of each request. However, CSC Leon is committed to making the best use of available resources to address the highest priority needs. Should a proposal be recommended for funding at a lower amount than requested, the entity may decline the award or be offered a one-time limited revision of proposed funding deliverables to be negotiated directly with a CSC Leon team member.

X. LOBBYING PROHIBITION

From the time that this RFA opens until the selection of proposals to fund, applicants (its agents, officers, principals, and employees, including any individual assisting the applicant in this process) will not engage in any written or verbal communication or any lobbying efforts or other attempts to influence the CSC Leon (including Council Members, team members or any member of the community impact panel), regarding this RFA, the merits of the applicant, or regarding whether CSC Leon should retain or select the applicant with respect to this proposed request. All questions should be posed during the informational sessions or through the formal Q&A process identified above.



**Children's Services Council of Leon County
Summer Feeding 2023 Funding Opportunity
Program Application Overview**

The Children's Services Council of Leon County (CSC Leon) is a catalyst for positive change to improve the lives and outcomes of children, youth and families in the local community. Established as an independent special district by the voters of Leon County in 2020, CSC Leon provides funding through ad valorem taxation to organizations that increase school readiness, provide school-age supports and reduce juvenile crime; improve child physical and mental health, while reducing adverse childhood experiences; and provide youth development opportunities, increase food and housing stability, and support caregivers. At its core, CSC Leon seeks to make funding decisions based on the following values: inclusive, data-driven, equitable, collaborative, and innovative. By funding and making available prevention and early intervention services while using a results-based accountability framework, CSC Leon's ultimate goal is to ensure all children and youth in Leon County are socially, emotionally, and physically equipped to reach their full potential.

I. OVERVIEW

CSC Leon seeks to issue program funding to expand the capacity of programs to better meet specific needs of children, youth, and families in Leon County during the summer of 2023, specifically in the areas of child and youth development and food insecurity. Additional funding opportunities to support implementation of new programs or sustained support for existing programs are planned for the near future and may include additional family support services (e.g., expanded access to mental health, childcare, etc.). This round of summer funding is expected to be issued on May 15, 2023, and be expended by August 30, 2023. Funded entities will be required to secure minimum levels of insurance, certify background clearance for all staff and personnel working directly with children and youth, collect and enter data on program participants using prescribed tools, and submit detailed financial reports. Funded entities will be required to use the CSC Leon Services and Activities Management Information System (SAMIS) on a weekly basis. Any CSC Leon funds not expended by August 30, 2023, must be returned along with a detailed Final Report.

II. SUMMER FEEDING FUNDING INTENT

CSC Leon is seeking proposals to expand the availability of nutritious food for children, youth and their families through the addition and extension of existing summer feeding programs and innovative meal provision solutions. Investments in summer feeding align with the CSC Leon's priority of "Stable and Nurturing Families/Communities" by reducing the number of households experiencing summer food insecurity.

These funds are designed to eliminate the barriers keeping summer feeding programs from being as successful as they could be. As such, programs can apply to expand existing services or start new programs using available best practices.

Entities may apply for both summer 2023 funding opportunities but must not supplant existing resources nor request funds for the same line items across requests.

Training and technical assistance will be provided to all funded entities to ensure program success and accountability.

III. ELIGIBILITY

Any entity legally authorized to conduct business in the State of Florida is eligible to apply for this funding. In the case of a tie between entities, preference will be given to not-for-profit entities with a current IRS determination status. Entities currently receiving funding from other community funding partners are eligible to apply for funds, but CSC Leon funds may only be used to expand services and not supplant or duplicate funding for existing services. *For example, if an entity has or receives funding from another agency to support a Summer BreakSpot and the program has need for feeding the family members of those participating, then that application could be accepted for consideration.*

IV. APPLICATION PROCESS

(to be entered after meeting with Webauthor)

V. SCOPE OF WORK

A. Background/Rationale

The CSC Leon Needs Assessment (2022) identified about half of individuals who are experiencing food insecurity in Leon County are not eligible for federal food or nutrition programs. Therefore, it is critical that non-federally funded services and programs operate within the community.

Feeding programs have clear health, education, and economic benefits and reap positive short- and long-term outcomes for children and youth. Immediate benefits include mitigating cognitive decline, enhancing summer academic retention, and reducing risky behaviors. Long-term outcomes can include increased high school graduation rates and reduced susceptibility to chronic diseases, both of which result in higher taxpayer burden and economic loss.

According to national pre-Covid data (2019), only 14 of every 100 children receiving free and reduced-price lunch during the school year participated in summer feeding programs. Barriers to participation such as lack of awareness, transportation challenges, program structure and meal site location contribute to these low numbers. Covid-inspired innovative approaches designed to increase summer meal participation have successfully enhanced accessibility and increased participation in summer feeding programs. Examples include BUT ARE NOT LIMITED TO:

1. Grab-and-go meals, food bags, or boxes
2. Meal delivery to school bus stops or community locations

3. Provision of meals at childcare centers or summer learning programs that do not currently offer free meals to its students/participants
4. Serving multiple meals at once thus allowing children/youth to take them away at existing “BreakSpots,” summer programs, childcare facilities, etc.
5. Providing “bulk foods” to help meet nutritional guidelines for multiple days
6. Backpack programs at schools, childcare centers or summer camps that allow children to take shelf-stable foods home for weekend access.

B. Required Program Elements

B.1 Organizational Profile

All entities submitting a proposal are required to complete an organizational profile that will include, at minimum, the following:

1. Primary applicant name and contact details
2. Total amount requested
3. Brief overview of applicant entity including vision, mission, and history of service.
4. Brief overview of applicant leadership (background and resume of program administrator and primary program manager if different from administrator)
5. Organizational Chart (if proposal includes the addition of new staff, indicate this clearly on the chart)
6. Current Division of Corporations Business Registration
7. Current IRS Nonprofit Status Determination Letter, if applicable
8. Current Certificate of Insurance/Proof of Liability Coverage
9. Most recent annual budget, profit/loss statement, or 990 filing.

In addition, programs are encouraged to submit up to three letters of support from community partners and/or previous service recipients.

B.2 Proposal Design

Entities applying for Summer Feeding are required to show evidence of the following in their proposal.

1. Funds must be used to eliminate the barriers keeping summer feeding programs from being as successful as they could be.
2. Programs must identify the percent of CSC funded meals that will be prioritized for children, youth and families who live in the targeted zip codes of 32301, 32303, 32304, 32305, and 32310. Feeding sites that are located in these targeted areas or offer free delivery to families that reside in the target areas will receive higher points.
3. Meals must be offered to families for free.
4. Programs must provide appropriate staffing to achieve goals of feeding proposal.
5. Programs must demonstrate knowledge of appropriate food storage practices, if applicable.
6. Programs must demonstrate thorough understanding of the provision of balanced nutrition within their feeding plans. Proposals must include a sample menu.
7. Proposals must include an estimated “cost per meal” calculation.
8. Proposals must demonstrate capacity to market their program and distribute the expected number of meals to families.
 - a. Budget requests can include funding for marketing materials.
9. Proposals must demonstrate capacity to adhere to the data collection requirement listed below.
 - a. Budget requests can include funding for data collection and entry.

10. Proposals must demonstrate capacity to adhere to the reporting requirements listed below.

B.3 Proposal Budget

Entities submitting a proposal for Summer Feeding are required to submit a project budget that is separate from their regular budget. It will include specific line items that must correspond to a written narrative matching the “Community Investment Partners (CIP) Fiscal Guidelines” available on the CSC Leon website: [INSERT URL](#). Entities will be required to develop their budget in the SAMIS portal. Uploads will not be accepted.

C. Data Collection Requirements

Entities selected for Summer Feeding are required to collect and report the following. All data must be input into SAMIS. Tools and training will be provided.

1. Number of meals provided per location per week.
 - a. Programs will be required to track the number of meals distributed each week. Additional demographic details on who received the meals will also be required.
2. Basic demographic details for families served, when applicable, including zip code.
 - a. Programs will be required to gather demographic data to help CSC Leon better understand the types of families accessing services including age, grade, race, gender, zip code, when known.
3. Parent/Caregiver Feedback (using CSC Leon provided questionnaire)
 - a. To contribute to CSC Leon’s composite picture of program performance, providers will be required to distribute an “invitation to share feedback” with families accessing services. This short survey is optional for families and will not be required to receive or continue receiving services.

D. Performance Indicators

Entities selected for Summer Feeding are expected to meet the following process measures and outcomes. These will be calculated by the data input into SAMIS.

1. Programs will meet or exceed total food distribution goals over the course of the project.
2. Programs will meet or exceed weekly food distribution goals 90% of the time.

E. Reporting Requirements

Entities selected for Summer Learning will provide the following regular reports through a standardized template in SAMIS.

1. Weekly Distribution Reports including demographic data of children, youth and families served, if known, will be required two business days after the conclusion of the last day of the previous week.
2. A “Mid-summer Report” is required by July 10. The report shall include, at minimum, a brief narrative, status report on data collection efforts, and overview of expenditures through June 30. Additional elements may be required.
3. A “Final Report” is required by September 15. The report shall include, at minimum, a complete program narrative, final distribution records, and a detailed expenditure report. Unspent funds are required to be returned no later than September 30 to avoid fines or exclusion from future funding opportunities.

VI. ADDITIONAL REQUIREMENTS

Entities selected for summer feeding funding will be expected to do the following:

A. Insurance

The program provider shall procure and maintain for the duration of the program insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Provider, its agents, representatives, employees, or subcontractors. The cost of such insurance shall be the sole responsibility of the Provider.

The program provider shall also provide adequate liability insurance coverage on a comprehensive basis and to hold such liability insurance at all times during the provision of services. Upon contract signing, the Provider shall furnish CSC Leon with a current Certificate of Insurance listing CSC Leon as the Certificate Holder and an Additional Insured with respect to general liability and automobile liability (if applicable).

B. Financial Management

The program provider must comply with the accounting principles and procedures outlined in the Financial Accounting Standards Board, Statement of Financial Accounting Standards 116 and 117, and This means the program provider must have and utilize adequate internal controls and maintain necessary source documentation for all costs incurred.

C. Site Visits and Mandatory Training

All program providers are subject to monitoring and quality site visits throughout the contract period. During a prearranged monitoring visit, a CSC Leon team member will request access to specific items that may include personnel files for all CSC-funded staff (paid and volunteers) including completed background checks, organizational policies, program files, insurance certificates, back up of expenditures, payroll, etc. A checklist of required items will be provided at least 24 hours in advance of a scheduled visit.

All program providers will be required to attend training on the relevant data collection tools and the data collection system, SAMIS, before any funds are dispersed. These trainings will be offered in person and virtually.

D. Data Security

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VII. EVALUATION PROCESS

A. COMMUNITY IMPACT PANEL

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B. SCORING CRITERIA

1. Relevant Experience & Relationships – up to 20 points

Volunteers will use items reported in the proposal organizational profile and design sections to evaluate the following:

- a. The applicant provides evidence that the program will be led by an organization and individuals with the relevant experience, past performance, and qualifications needed to aid in the program's success.
- b. The applicant is registered to conduct business in Florida and all required documentation is current and included with the proposal.
- c. The applicant demonstrates established relationships with community stakeholders.

2. Proposal Narrative – up to 50 points

Volunteers will use items reported in the proposal design and budget sections to evaluate the following:

- a. The applicant demonstrates a thorough understanding of the goals associated with the funding opportunity and the limitations of existing summer feeding programs.
- b. The applicant provides evidence that the proposal is able to serve children, youth and families in specific neighborhoods identified by CSC Leon.
- c. The applicant demonstrates a thorough understanding of appropriate
- d. The applicant demonstrates a thorough understanding of nutritional standards and appropriate food storage practices (if appropriate) as evidenced by its meal plan.
- e. The applicant has or will have the sufficient personnel/professional staff experience to carry out the proposed program, including meeting marketing, data collection and reporting expectations.
- f. The applicant offers a competitive value as evidenced by its "cost per meal" calculation.

3. Budget – up to 30 points

Volunteers will use items reported in the proposal organizational profile and budget sections to evaluate the following:

- a. The applicant provides a complete, cost-effective budget that aligns with the proposal design.
- b. The applicant provides evidence that the amount requested does not supplant existing funds.
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C. PROPOSAL PRESENTATION

Entities submitting a proposal for Summer Learning will be invited to provide a 20-minute presentation outlining their proposal and answering specific questions from the review panel. The exact date, time, location and format will be provided upon successful submission of a proposal (i.e., submitting on time, meeting eligibility requirements, and including all required elements).

VIII. TIMELINE

Activity	Date	Time
Release Funding Announcement	Monday, February 6	By 5:00 p.m.
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Children's Services Council of Leon County

2022/2023 Future Meetings & Events

Dates & Locations

(All times are E.T.)

DATE	TIME	SUBJECT	LOCATION
Wednesday, January 4	3:30 pm	Investment Workgroup Meeting	Via Zoom https://us06web.zoom.us/j/88375128620
Thursday, January 5	2:00 pm	Auditor Services RFP Public Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Monday, January 9	5:00 pm	Executive Committee Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Thursday, January 12	5:00 pm	Program Services Committee Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Thursday, January 19	3:00 pm	Regular Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Thursday, January 26	5:30 pm	Family Listening Session	Sabal Palm Elementary School, 2813 Ridgeway Street
Tuesday, January 31	5:30 pm	Family Listening Session	Jack McLean Community Center, 700 E Paul Russell Road
Wednesday, February 1	5:30 pm	Family Listening Session	Lake Jackson Community Center, 3840 N Monroe Street, Unit 301
Thursday, February 2	3:00 pm	Regular Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Thursday, February 9	5:00 pm	Program Services Committee Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Thursday, February 16	4:00 pm	Regular Meeting	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Friday, February 17	10:00 am	Ribbon Cutting: CSC Leon Public Office	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50
Friday, February 17	3:00 pm	Open House: Community Resource Center	CSC Leon Public Office, 2002 Old. St. Augustine Rd., Suite A-50