

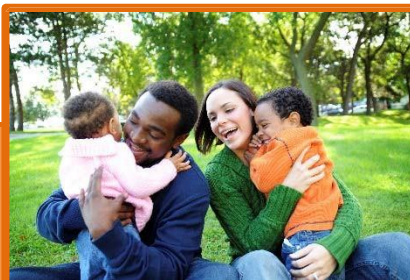


CONTINUOUS IMPROVEMENT INITIATIVE GUIDELINES

2019-2020

Application deadlines for 2019-2020:

October 31, 2019 ❖ January 30, 2020 ❖ April 30, 2020 ❖ July 30, 2020



What is the purpose of the Continuous Improvement Initiative?

Launched in February 2007, the Continuous Improvement Initiative (CII) was conceived as a way to build the capacity of agencies under contract with Children's Services Council (CSC) and United Way (UW). CII is in its thirteenth year of funding and as of September 2018, almost \$2,000,000 has been made available to over 60 different agencies.

Which agencies are eligible for funding?

- 1) CSC-funded nonprofit organizations, including those agencies that are subcontracted to provide services on behalf of CSC for any time period between FY October 1, 2019-September 30, 2020.
 - a) Afterschool and childcare providers that have achieved Emerging and Promising status through Strong Minds are eligible for funding through CII.
 - b) Afterschool and childcare providers receiving Tier 1 or Tier 2 reimbursements through Strong Minds are not eligible to participate in CII.
- 2) United Way funded nonprofit organizations, who receive funding through the Community Care Fund, for any time period between October 1, 2019-September 30, 2020.

What can an agency receive funding for?

There are three categories of support available:

- 1) Organization Development Supports
- 2) Obtaining Agency Accreditation
- 3) Improving IT Infrastructure

Funding limits vary by category. Agencies may submit applications, during scheduled application cycles, for multiple categories during a twelve-month period; this is a rolling 12-month period which begins when an agency initially receives funding from CII. During a twelve-month period, each category can only be applied for once, even if the maximum funding amount is not received.

- 1) Organization Development Supports category requests are limited to \$10,000
- 2) Accreditation category requests are limited to \$10,000
- 3) IT Infrastructure category requests are limited to \$15,000

NOTE: Agencies with requests greater than the maximum funding amount for any category must provide narrative in question 4 of the application on how they will fund the difference. Agency will need to secure these additional funds within 3 months of the application's approval.

Ineligible Expenses

The Continuous Improvement Initiative will not consider applications for items or services purchased prior to submission.

How can the funding be used in each category?

ORGANIZATION DEVELOPMENT SUPPORTS

Funding is available to support work in the areas of: strategic planning; board governance; organization restructuring; financial management; and human resource management. Funding request must align with the criteria below.

- 1) As funding is limited, CSC funded agencies must access the Grants to Reach Organizational Wellness (GROW) supports available through Nonprofits First prior to submitting an application for this category.
- 2) Agencies applying for funding in this category should submit an Action Plan, outlining the scope of services they are requesting support for and identifying who they anticipate using to deliver any needed consulting services, and the associated costs.
 - a) Two quotes are required for Organization Development Supports or an agency can submit a justification in the narrative section of question 4 on the application as to why they must use a specific consultant/vendor.

Ineligible Expenses

- 3) Funding is not available to hire employees, provide staff incentives or support appreciation events.
- 4) Funding is not available to support fund development or fundraising. Examples include: software such as CRM, consultant fees to help with fund development, and/or training on software. NOTE: CRM solutions can still be used for other purposes such as managing other data unrelated to fund development.
- 5) Applications simply requesting \$10,000 for organization development supports will not be considered.

OBTAINING AGENCY ACCREDITATION

Funding is available to support accreditation by Nonprofits First through one of the following two subcategories:

- 1) Support to obtain Agency Accreditation:
Funding under this subcategory can be used for outside consultants to address areas of development as identified in the self-assessment; administrative support in preparing for the accreditation process; or for advanced technical assistance for agencies going through reaccreditation.

NOTE: Agencies requesting support to obtain Agency Accreditation must have first completed a self-assessment for the Agency Accreditation process and documentation of this must be on file with the application. New providers requesting funding for this category are strongly encouraged to apply in the first funding cycle (applications due by October 31, 2019).

- 2) Cost of Agency Accreditation:
Funding under this subcategory can be used to support the fee for Agency Accreditation for Sound Business Practices through Nonprofits First, Inc. Requests are limited to the cost of agency accreditation for Sound level only.

Agencies and Subcontractors of CSC in good standing are eligible to apply for funding to support the full price of the Accreditation fee, if it is not already designated in their program budget.

NOTE: Providers requesting funding for this category are strongly encouraged to apply in the first funding cycle (applications due by October 31, 2019) to ensure adequate time for review and approval prior to being billed by Nonprofits First.

Ineligible Expenses

UW Partner agencies are not eligible to apply for the cost of Agency Accreditation.

IMPROVING IT INFRASTRUCTURE

Funding is available to support the costs of hardware and software, including installation and training support. Funding request must align with the criteria below.

- 1) Agencies applying for funding in this category must submit one of the following with each request for IT Infrastructure:
 - a) a proposal from the proposed vendor with a technology assessment of the agency's infrastructure; OR
 - b) a copy of their formal Technology Plan. If the agency does not have a Technology Plan currently in place, the agency can utilize *Technology Plan (see Technology Plan Guidance and Template form on website)*, to create a technology plan and meet this requirement.
 - c) and if the agency is applying for new computers, a computer inventory is required (see Technology Plan Guidance, Page 3).
- 2) A minimum of 2 quotes is required for any IT Infrastructure request (hardware, software and/or service) unless the quote provided is through a cooperative procurement agreement or state/federal purchasing contract (e.g., National Joint Powers Alliance (NJPA), State of Florida IT Contract, GSA Schedule, etc.). If the agency has a contract agreement with a specific IT vendor, comparable quotes still must be provided for hardware and software. Details must be provided in the narrative section of question 4 on the application.
- 3) IT Infrastructure hardware quotes must have comparable specifications. At a minimum, hardware specifications should include details listed in *Specifications & Resources* (see Appendix A - processor, RAM, hard drive, operating system, warranty, etc.)
- 4) Base specifications for hardware that CII will consider supporting are outlined in *Specifications & Resources* (see Appendix A). Equipment outside of those specifications can be requested if sufficient justification is provided as to business reason of why the deviation is necessary.
- 5) If you are requesting a physical phone system over a cloud-based solution, proper justification is required to support proposed solution. A cloud-based solution may not be appropriate for all applications but is always worth comparing to physical hardware to reduce capital expenses and provide disaster recovery options.
- 6) As software applications move to the cloud, CII will pay for the cost of the first year of an annual subscription and any conversion costs. Details must be provided in the narrative section of question 4 on the application describing how the agency will cover the cost of the annual subscription on an ongoing basis through means other than CII.

- 7) Priority will be given to infrastructure expenses that support an entire organization. Examples include, finance, human resources, and administrative positions. This includes infrastructure related to technology expenses such as a server, network equipment, phone system, etc.
- 8) Requests to replace computers that have been purchased with CSC funds for use by funded program staff at select agencies may be supported through the Computer Replacement Initiative. If a position is funded by CSC at **or above the 50%**, they would not be eligible for CII, however, could be eligible through the Computer Replacement Initiative.

Ineligible Expenses

- 9) Funding may not be used for website development, ongoing maintenance support from Nonprofits First or other technology vendor.
- 10) Funding is not available to support computer equipment for staff in a specific program or position that is not funded by CSC or UW.
- 11) Funding may not be used to purchase consumables (USB flash drives, printer cartridges, etc.).
- 12) Information technology hardware solely for the use of clients will not be considered.
- 13) Computer hardware less than 5 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.
- 14) Computer monitors less than 10 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.

How can an agency submit an application?

Applications are available for download at:

United Way of Palm Beach County www.unitedwaypbc.org
Children's Services Council of Palm Beach County www.cscpbc.org

Applications must be complete and include all requested information to be considered.

- 1) Completed and signed application cover page
- 2) Completed application questions
- 3) Applications for the following categories of assistance must also include the following:
 - a) Organization Development Supports: copy of Action Plan/Proposed Scope of Work and two quotes from vendors
 - b) Agency Accreditation: Nonprofits First invoice

c) IT Infrastructure: Technology Plan and two quotes from vendors

Application and all attachments must be submitted as a single PDF document and electronically sent to:

Tamara Worley, United Way of Palm Beach County at TamaraWorley@UnitedWayPBC.org with the following subject line: Continuous Improvement Initiative Application – [Name of Organization]

NOTE: Hard copy applications will no longer be accepted.

Application Review and Approval Process

The CII Advisory Panel will review the applications and make recommendations for funding. The Community Impact Committee of United Way reviews those recommendations for approval and funds are subsequently released to the providers. The panel will consist of representatives from CSC and UW. Applications will be reviewed multiple times during the year.

Applications must be submitted by the established deadlines to be considered during that funding period. The following deadlines have been established, contingent upon availability of funding:

October 31, 2019 ❖ January 30, 2020 ❖ April 30, 2020 ❖ July 30, 2020

What documentation must be submitted after services have been rendered and the project is complete?

Following the delivery of services, the agency will be required to submit a *Project Completion Report* (See form on website) to United Way. The report also includes:

- a) a *Financial Reconciliation Statement* (See form on website)
- b) with attached financial reconciliation of funds from the vendor that the funds have been used as intended and described in the application. Examples of financial documentation include: invoices from vendor, copy of cancelled check made payable to the vendor, etc.

The *Project Completion Report* (See form on website) and the *Financial Reconciliation Statement* (See form on website) must be submitted to United Way no later than one year from the date of the award.

Any funds unexpended or unaccounted for must be returned to United Way. Please note that failure to submit the report by the due date could result in your agency having to return these funds and/or could affect future requests for funding under the Continuous Improvement Initiative.

NOTE: The grant may only be used for the purposes described in the approved application. Any deviation must be requested in writing and you must receive prior approval in writing from the Continuous Improvement Initiative Advisory Committee.

Project Completion Report and all attachments must be submitted as a single PDF document and electronically sent to:

Tamara Worley, United Way of Palm Beach County at TamaraWorley@UnitedWayPBC.org with the following subject line: Continuous Improvement Initiative Project Completion Report – [Name of Organization]

Who can an agency contact with questions?

For questions regarding the CII guidelines, application and/or reporting requirements, contact:

Tamara Worley
Contracts & Initiatives Manager
United Way of Palm Beach County
Email: TamaraWorley@UnitedWayPBC.org
Phone: (561) 375-6630

For questions regarding agency accreditation or GROW Program contact:

Nonprofits First
(561) 214-7435

Appendix A

Specifications & Resources

CSC can assist in the procurement of any IT hardware if you are not able to meet these price points. We strongly suggest the 5-year next business day warranty with all PC equipment purchased. This is our standard for all IT equipment purchased to minimize the risk of incurring expensive repairs during the most expensive years of ownership (year 4 and 5).

BASE HARDWARE – (Minimum Requirements)

Desktop:

Cost: Up to \$1,000

- Intel i5 Processor (or compatible i.e. AMD)
- 4GB of RAM
- 128GB Solid State Drive (SSD)
- Windows 10 Pro
- 5-year warranty (5-year warranty with next day business support is recommended)

Laptop (desktop replacement):

Cost: Up to \$1,400

- Intel i5 Processor (or compatible i.e. AMD)
- 4GB of RAM
- 128GB Solid State Drive (SSD)
- Windows 10 Pro
- 5-year warranty (5-year warranty with next day business support is recommended)
- Up to 5 years and Accidental Damage is supported if cost effective

Basic Laptop (basic internet / presentations):

Cost: Up to \$800

- Intel i3 Processor (or compatible i.e. AMD Athlon II)
- 4GB of RAM
- Windows 10 Pro
- 5-year warranty (5-year warranty with next day business support is recommended)

NOTE: 2-in-1 laptops are recommended for all laptop replacements and can be purchased within the price points provided.

Tablet:

Cost: Up to \$550

- 32GB Tablets are recommended unless additional storage is warranted, and proper justification is provided.

Docking Station (if required):

Cost: Up to \$175

- This is an option for laptop users who spend time in the office and away from their desk

Monitor (if required):

Cost: Up to \$200

- 5-year warranty (5-year advanced replacement warranty is recommended)

NOTE: 22" LCD or LED Wide Screen Monitor and Docking station can be requested with the purchase of a laptop if the proper justification is provided. Monitors are still only replaced every 10 years.

Example: I am purchasing a laptop to replace a desktop computer. My desktop is 5 years old.

Solution: Purchase a laptop and docking station. The monitor from your desktop can be used with your new laptop and will be eligible for replacement once it reaches 10 years old.

ADDITIONAL NOTES:

- 1) As a security best practice, we recommend enabling data encryption on all your PC equipment.
- 2) Microsoft BitLocker is a free way to encrypt your laptop or desktop and can be managed by a central encryption management console if additional software is purchased. BitLocker comes standard with Windows 10 Pro.
- 3) Computer monitors less than 10 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.
- 4) Computer hardware less than 5 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.
- 5) Hardware above the base specifications can be requested with full justification as to the business need and why the base model cannot meet the business requirement.

SOFTWARE RESOURCES

The following are resources available for non-profit organizations, and agencies are strongly encouraged to check these websites prior to submitting a CII request for IT infrastructure:

- 1) Techsoup – <http://www.techsoup.org> – Provides a broad array of deeply discounted software for a small administrative fee. Some of the software available includes: Adobe, Microsoft, Intuit, Symantec, etc.
- 2) Microsoft Nonprofit Licensing - <https://www.microsoft.com/en-us/nonprofits> or <http://www.microsoft.com/nonprofit> - Provides every nonprofit resource that Microsoft offers through a single website. Some of the most exciting products that Microsoft offers for FREE includes: Microsoft Office 365 (online email suite), SharePoint (online collaboration), OneDrive (cloud storage for files), and Skype for Business. Microsoft additionally offers many advanced products for 50% - 90% off MSRP retail pricing.
- 3) U.S. Communities - <http://www.uscommunities.org/nonprofit/> - Provides access to one of the largest cooperative purchasing initiatives for non-profit agencies to leverage.