



# CONTINUOUS IMPROVEMENT INITIATIVE GUIDELINES

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## 2022-2023

Application cycle deadlines for 2022-2023:

November 3, 2022 ❖ February 2, 2023 ❖ May 4, 2023 ❖ August 3, 2023



## **ATTENTION**

**Review CII Guidelines thoroughly prior to submitting application.**

**Please note: each funding category has specific criteria and supporting documentation requirements that must be met.**

**Hardware and/or software for staff that are not part of a UW or CSC funded program is an ineligible expense. Hardware and/or software for newly created or future positions are ineligible. Exceptions include requests for antivirus or computer operating system software.**

**Applications that fail to meet the criteria below will be automatically disqualified from the review and approval process.**

In order for any application to be considered for funding, it must:

- 1) Meet the specific criteria for each funding category set forth in the guidelines.
- 2) Include a completed and signed application cover page.  
Application must be signed by Executive Director.
- 3) Provide complete, specific, and adequate answers to all questions.
- 4) Include all required supporting documents (e.g., computer inventory, quotes, IT plan, action plan, Nonprofits First Accreditation Self-Assessment, etc.).

**If you have any questions prior to submitting, see Section 8 for who to contact.**

## Section 1: 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/or United Way of Palm Beach County (UW). Objectives of the initiative include:

- 1) Support an agency’s ability to change and achieve greater effectiveness by developing, improving, and reinforcing their strategies, structures, and processes.
- 2) Assist contracted agencies with obtaining their Nonprofits First accreditation to strengthen their administrative, operational capacity and financial health.
- 3) Develop an effective and sustainable technology infrastructure that improves the productivity of the overall agency and administrative staff, as well as programs and staff funded by CSC and/or UW.

## Section 2: Which agencies are eligible for funding?

- 1) CSC-funded nonprofit agencies, including those agencies that are subcontracted to provide services on behalf of CSC for any time period between FY October 1, 2022 - September 30, 2023.
- 2) Afterschool and childcare providers that have achieved Emerging and Promising status through Strong Minds are eligible for funding through CII.
- 3) United Way funded nonprofit agencies, who receive funding through the Community Care Fund, for any time period between October 1, 2022 - September 30, 2023.
- 4) 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 funding through CII.

### **Ineligible Agencies:**

- Afterschool and childcare providers receiving Tier 1 or Tier 2 reimbursements through Strong Minds are not eligible to participate in CII.
- If an agency supports a staff position, which is funded by CSC at **or above the 50%**, they would not be eligible for CII, however, could be eligible through the CSC Computer Replacement Initiative.
- Grant recipients of CSC Great Ideas Initiative are not eligible to apply for funding through CII.

**NOTE:** If you are a CSC funded agency and have questions about your Agency’s Strong Minds status or percentage of staff positions supported by CSC, please contact Nancy Esparza (Nancy.Esparza@cscpb.org).

## Section 3: What can an agency receive funding for?

There are three categories of support available:

Category	Maximum Request Limit *
Organization Development Supports	\$10,000
Obtaining Agency Accreditation	\$10,000
Improving IT Infrastructure	\$15,000

Agencies may submit an application for any and all categories during a twelve-month period. Agencies cannot receive more than one award in a 12-month period for any category, even if the maximum funding amount was not awarded. If an agency received an award for a category, they are not eligible to apply for that same category until 12 months after the previous award letter date.

**NOTE:** CSC and UW reserve the right to decide which categories require prioritization.

\* 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. The Agency will need to secure these additional funds within 3 months of the application's approval.

**Ineligible Expenses:**

- CII funds will not be awarded for items or services purchased prior to submission of application.
- Applications submitted after the established deadlines for each cycle will not be reviewed until the next cycle.

**Section 4: How can the funding be used in each category?**

**A. ORGANIZATION DEVELOPMENT SUPPORTS**

Funding is available to support the growth and development of an agency in the following areas: strategic planning; board governance; agency restructuring; financial management; and human resource management. These activities are often implemented utilizing a consultant and may include training. Funding request must align with the criteria below.

Agencies applying for funding in this category must submit the following:

- 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.
- 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:**

- Human Resources Management does not include professional development for staff that benefits personal growth.
- Funding is not available to hire employees, provide staff incentives or support appreciation events.
- Funding is not available to support fund development or fundraising. Examples include: software such as Customer Relation Management (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.
- Applications simply requesting \$10,000 for agency development supports without proper supporting documentation will not be considered.
- CSC funded agencies who receive Grants to Reach Organizational Wellness (GROW) supports available through Nonprofits First may not submit an application for this category until all GROW funds have been exhausted.
- For questions about GROW funds, contact the Nonprofits First Coordinator at 561-214-7435.

## **B. 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.

Agencies applying for funding in this category must submit the following:

- Documentation of Agency's completed Self-Assessment accreditation process, the assessment must be included with the application.

### **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.

Agencies applying for funding in this category must submit the following:

- Nonprofits First invoice.

**NOTE:** Providers requesting funding for this category are strongly encouraged to apply in the first funding cycle (applications due by November 3, 2022) 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.

## **C. 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.

Agencies applying for funding in this category must submit the following:

- A proposal from the IT vendor who conducted a technology assessment of the agency's infrastructure, OR a copy of the agency's formal Technology Plan. See Appendix A of the guidelines (Sample Technology Plan) for an example of the information to be included in a formal agency Technology Plan.
- If the application includes a request for computers, a current computer inventory for **all** staff is required. The computer inventory must include all staff, not just staff requesting to receive a new computer. See Appendix B of the guidelines (Sample Agency Computer Inventory) for an example of all required information that must be included in your agency computer inventory.
- 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. **NOTE:** Question 4B (table) should only include the vendor the agency has chosen.

- a) IT Infrastructure hardware quotes must have comparable specifications. At a minimum, hardware specifications should include the following: processor, RAM, hard drive, operating system, and warranty.
- b) See Appendix C (Specifications & Resources) for a list of minimum required specifications for hardware. Equipment not meeting these minimum specifications can be requested if sufficient justification is provided as to the business reason for deviation.

**The following outlines eligible and ineligible expenses:**

**Hardware Expenses**

- 1) Hardware for staff in a funded UW or CSC program is an eligible expense. Examples: laptop, docking station, desktop, monitor, etc. **NOTE:** Requests to replace computers that have been purchased with CSC funds for use by funded program staff at select agencies may be supported through CSC's Computer Replacement Initiative. If a position is funded by CSC at **or above the 50%**, they would be ineligible for CII, however, could be eligible through the Computer Replacement Initiative. Contact your CSC Program Officer with specific questions related to the initiative.
- 2) CII funds are not intended to support newly created or future positions therefore, hardware for newly created or future positions are ineligible.
- 3) Hardware for staff who support the entire organization is an eligible expense. Examples: finance, human resources, and administrative positions.
- 4) The purchase of an additional computer for a staff position is an ineligible expense. Example: desktop and laptop issued to one staff position.
- 5) Infrastructure needs related to the entire organization are eligible expenses. Examples: server, network equipment, phone system, etc. **NOTE:** Cloud-based solutions are recommended however, physical solutions can be requested with proper justification to support the request. 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) Hardware solely for the use of clients is an ineligible expense.
- 7) 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.
- 8) 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.
- 9) Battery backup for a desktop, server, etc. is an eligible expense. Battery backup for a laptop is an ineligible expense.

**Software Expenses**

- 1) As software applications move to the cloud, the fee for the first year of an annual subscription and any conversion costs are eligible expenses. Ongoing annual subscription fees are an ineligible expense. Details must be provided in the narrative section of question 4 on the application describing how the agency will pay for the ongoing annual subscription fees.
- 2) CII funds are not intended to support newly created or future positions therefore, software for newly created or future positions are ineligible.
- 3) Software such as Microsoft Office for staff in a funded UW or CSC program and staff who support the entire agency (e.g. finance, human resources, IT, and administrative positions) is an eligible expense.
- 4) Antivirus and computer operating system software for all agency staff is an eligible expense.
- 5) Customer Relation Management (CRM) software used for fundraising purposes only is an ineligible expense.

**Other Ineligible Expenses:**

- 1) Hardware and/or software for staff that are not part of a UW or CSC funded program is an ineligible expense. Exceptions include requests for antivirus or computer operating system software.
- 2) Funding for website development is an ineligible expense.
- 3) Funding for ongoing maintenance support from technology vendor is an ineligible expense.
- 4) Funding to purchase office supplies/equipment. Examples: USB flash drives, printer cartridges, paper shredders, laptop cases, etc. is an ineligible expense.
- 5) Funding to lease office equipment. Example: copy machine, printers, etc. is an ineligible expense.
- 6) Funding to train staff to use a fundraising software system is an ineligible expense.

**NOTE:** Cybersecurity software is recommended to replace antivirus software since most cybersecurity attacks are malware and preventable through intrusion prevention software applications. We recommend exploring software that is focused on behavioral analytics of your computer instead of a traditional definition driven antivirus solution. Examples: Cylance, Carbon Black, SentinelOne, CrowdStrike, etc.

**Section 5: How can an agency submit an application?**

Applications are available for download at:

- United Way of Palm Beach County [www.unitedwaypbc.org](http://www.unitedwaypbc.org)
- Children’s Services Council of Palm Beach County [www.cscpbc.org](http://www.cscpbc.org)

**Applications that fail to meet the criteria below will be automatically disqualified from the review and approval process.**

In order for any application to be considered for funding, it must:

- 1) Meet the specific criteria for each funding category set forth in the guidelines.
- 2) Include a completed and signed application cover page. Application must be signed by Executive Director.
- 3) Provide complete, specific, and adequate answers to all questions.
- 4) Include all required supporting documents (e.g., computer inventory, quotes, IT plan, action plan, Nonprofits First Accreditation Self-Assessment, etc.).
- 5) If an application exceeds the maximum funding allowed for any category of assistance, a description of how the agency will fund the difference for any request must be provided in section 4a. of application.

Applications for the following categories of assistance must also include the following:

Category	Required documentation	Reference
Organization Development Supports	<ul style="list-style-type: none"> <li>• Action Plan</li> <li>• Two vendor quotes</li> </ul>	See Section 4.A
Agency Accreditation Support to obtain Agency Accreditation	<ul style="list-style-type: none"> <li>• Documentation of Agency’s completed Nonprofits First Accreditation Self-Assessment</li> </ul>	See Section 4.B
Agency Accreditation Cost of Agency Accreditation	<ul style="list-style-type: none"> <li>• Nonprofits First invoice</li> </ul>	See Section 4.B
IT Infrastructure	<ul style="list-style-type: none"> <li>• Technology Plan</li> <li>• Agency Computer Inventory</li> <li>• Two quotes from vendors</li> </ul>	See Section 4.C

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](mailto:TamaraWorley@UnitedWayPBC.org) with the following subject line: Continuous Improvement Initiative Application – [Name of Agency]

**NOTE:** Hard copy applications will not be accepted.

## Section 6: Application Review and Approval Process

CSC and United Way 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.

Applications will be reviewed quarterly on an annual basis. Applications must be submitted by the established deadlines to be considered during that funding cycle. Applications submitted after the established deadlines will not be reviewed until the next cycle.

**The following deadlines have been established, contingent upon availability of funding:**

Cycle	Application Deadline
Cycle 1	November 3, 2022
Cycle 2	February 2, 2023
Cycle 3	May 4, 2023
Cycle 4	August 3, 2023

## Section 7: What documentation must be submitted after the services and/ or project is complete?

Following the completion of services/ or project, the agency will be required to submit a *Project Completion Report* (See form on website) to United Way. The report must also include:

- 1) A *Financial Reconciliation Statement* (See form on website)
- 2) 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 United Way.

**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](mailto:TamaraWorley@UnitedWayPBC.org) with the following subject line: Continuous Improvement Initiative Project Completion Report – [Name of Agency]

## Section 8: Who can an agency contact with questions?

For questions regarding:

- 1) CII guidelines, application and/or reporting requirements, contact:  
Tamara Worley  
Contracts & Initiatives Manager  
United Way of Palm Beach County  
Email: [TamaraWorley@UnitedWayPBC.org](mailto:TamaraWorley@UnitedWayPBC.org)  
Phone: (561) 375-6630
  
- 2) Agency accreditation or GROW Program, contact:  
Nonprofits First  
(561) 214-7435
  
- 3) CSC's Computer Replacement Initiative, CSC's supported positions or Strong Minds status, contact:  
Nancy Esparza  
Program Officer  
Children's Services Council  
Email: [Nancy.Esparza@cscpb.org](mailto:Nancy.Esparza@cscpb.org)  
Phone: (561) 374-7582

## Appendix A Sample Technology Plan

### Mission Statement

Organization mission statement here.

### Current State of Technology

This section should include a summary about the current state of the IT infrastructure and any related issues. The issues do not have to be existing but should be inevitable if the obsolete technology is reaching [or has already reached] its end of life. Examples: Servers, network equipment [firewalls, switches, routers, etc.], phone systems, copiers, and scanners.

Keep in mind a current computer inventory for all staff is required and computers will not be covered by the Continuous Improvement Initiative if the replacement computers requested are positions funded 50% (or more) by Children’s Services Council. See Section 4C of the guidelines for more information. These positions will be funded directly through the Computer Replacement Initiative and are not limited to the \$15,000 maximum by the Continuous Improvement Initiative.

### Proposed Technology Plan

This section should include the proposed technology requested and the rationale behind the equipment selected. An agency may come up with a solution based on a professional opinion (e.g., IT vendor, board member, etc.), IT committee formed to address the agency’s concerns, or staff recommendations backed by research performed identifying why the proposed solution will resolve the current issues.

Two quotes is required for any IT 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.

### Implementation Timeline of Plan

This section should include the implementation timeline of the entire technology plan.

### Technology Plan Budget

The following is an example of the information to include in the technology plan budget. Remember to attach a copy of each quote.

Quantity	Description	Purchasing Method	Vendor	Unit Price	Total
5	Dell i5 desktop PC, 8GB RAM, 128GB SSD, 23" Monitor	FL State Contract	Dell	\$1,225.00	\$6,125.00
2	Dell PowerEdge Server, 32GB RAM, 2TB RAID 5 Storage	FL State Contract	Dell	\$3,200.00	\$6,400.00
5	Microsoft Office 2016 Professional Plus	501c3 Charity	Techsoup	\$40.00	\$200.00
2	Microsoft Server Essentials 2012 R2	501c3 Charity	Techsoup	\$37.00	\$74.00
1	HP Network Laser Printer	3 quotes attached	CDW	\$1,200.00	\$1,200.00
10	IT Support to implement solution	Current IT Vendor	IT Vendor	\$75.00	\$750.00
<b>Total</b>					<b>\$14,749.00</b>

## Appendix B

### Sample Agency Computer Inventory

The following is an example of all required information that must be included in your agency computer inventory. A current computer inventory for all staff must be submitted with your Improving IT Infrastructure application. **IMPORTANT:** Highlight the computer equipment you are requesting for replacement.

Staff Name (First and Last)	Position/Title	Position Supports Agency or Program (Agency/Name of Program)	Computer Manufacturer (Brand Name)	Type of Computer (Laptop/Desktop)	Computer Model	Operating System	Date of Purchase (M/DD/YYYY)
Brian Coach	Executive Director	Agency	Lenovo	Laptop	IdeaPad	Windows 10	2/15/2020
Emma Jones	Administrative Asst	Agency	HP	Desktop	OptiPlex 3020	Windows 10	7/7/2018
Alice Brown	Receptionist	Agency	Lenovo	Desktop	ThinkCentre E73	Windows 7	11/15/2012
Jane Smith	Finance Director	Agency	Dell	Laptop	Latitude 7100	Win 10	1/1/2015
Sally Duncan	Volunteer Coordinator	Agency	Dell	Laptop	Latitude 5580	Windows 7	5/17/2017
Anne Johnson	Grant Writer	Agency	Dell	Laptop	Latitude 3590	Windows 10	7/7/2018
Peter Miller	Marketing Manager	Agency	Dell	Laptop	Latitude 3500	Windows 10	4/2/2019
Ted Burns	Program Coordinator	ABC Program	Dell	Laptop	Latitude 3500	Windows 10	2/22/2019
John Baker	Therapist	ABC Program	Dell	Laptop	Latitude 7000	Win 10	10/1/2018
Charlotte Williams	Program Coordinator	123 Program	Toshiba	Laptop	Satellite C55D	Win 8	10/1/2013
Tammy Hill	Therapist	123 Program	Toshiba	Laptop	Satellite C55D	Win 8	10/1/2013
Client Use	Resource Room	Not Applicable	Dell	Desktop	OptiPlex 3020	Windows 7	4/8/2012
Not Applicable	Conference Room	Agency	Dell	Desktop	OptiPlex 3020	Windows 7	4/8/2016

## Appendix C

### 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** (effective 8-2022)

##### **Desktop:**

***Cost: Up to \$1,000***

- Intel i5 or comparable AMD Processor (latest generation is recommended)
- 16GB of RAM
- 512GB Solid State Drive (SSD)
- Windows 10 Pro
- 4-year warranty (5-year warranty with next day business support is recommended)

##### **Laptop (desktop replacement):**

***Cost: Up to \$1,375***

- Intel i5 or comparable AMD Processor (latest generation is recommended)
- 16GB of RAM
- 512GB Solid State Drive (SSD)
- Windows 10 Pro
- 4-year warranty (5-year warranty with next day business support is recommended)

##### **Basic Laptop (basic internet/ presentations):**

***Cost: Up to \$800***

- Intel i3 or comparable AMD Processor (latest generation is recommended)
- 256GB Solid State Drive (SSD)
- 8GB of RAM
- Windows 10
- 4-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 \$500***

- 64GB Tablets are recommended unless additional storage is warranted, and proper justification is provided.

##### **Docking Station (if required):**

***Cost: Up to \$200***

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

##### **Monitor (if required):**

**Cost: Up to \$270**

- 1-year warranty (3-year advanced replacement warranty is recommended)

**NOTE:** Minimum 22" size 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.

**Server:**

**Cost of Server will vary based on the use and application per server**

- 5-year warranty

**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 agencies, 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.