Children’s Board of Hillsborough County
PRO 2020 – 12 Intent to Negotiate (ITN)
Level (1) Investment Grant
Children’s Board Family Resource Centers (CBFRC)
Appendix (#1) – Cover Sheet Instructions

Information requested is organizational demographics and is self-explanatory. The following information provides additional guidance:

1. Use the Applicant Organization’s legal name including any doing business as (d/b/a) name. The name should match the name listed on the Florida Department of State – Division of Corporation website www.sunbiz.org. If the organization is a large entity, such as a university where a department or a division may be applying, include that information in this section.
2. Include physical and mailing address, if applicable.
3. City.
4. State.
6. Organization Phone Number.
7. Organization Website, if applicable.
8. Designated organization type and date of incorporation, if applicable.
9. IRS Determination: Does the organization have a 501c3 or other tax designation?
10. Is the organization registered as a Florida charitable organization and allowed to engage in solicitation activities through the Florida Department of Agriculture and Consumer Affairs?
11. Is the organization currently receiving program funding from the Children’s Board?
    Technical Assistance funding is not considered program funding.
12. Amount of applying organization’s total budget for the most recent fiscal year.
13. Full name of CEO/Executive Director.
14. CEO/Executive Director phone number.
15. CEO/Executive Director email.
16. If the CEO/Executive Director is not the contact person for this proposal, provide the full name of the organization contact person for this proposal. The contact person is the person designated to respond to inquiries about this proposal.
17. Organization contact person phone number.
18. Organization contact person email.
19. Refer to the Hillsborough County Website: http://www.hillsboroughcounty.org/en/government/board-of-county-commissioners and click on Find My Elected Official to determine in which Board of County Commission district the Proposer organization resides.
20. Indicate if the organization is located within the city limits of the (3) municipalities in Hillsborough County (Tampa, Temple Terrace, or Plant City).
21. The Applicant Organization’s Authorized Official, an appointed official (e.g., chief executive officer, chief financial officer, etc.), to whom the organization has granted the legal authority to submit the proposal, and Board Chair must each sign (in blue ink) Attachment (#2), Cover Sheet, in order for the proposal to be considered for funding. 

Special Note: Failure to comply with providing an original signed copy in blue ink may result in disqualification of the Proposal from further consideration.
1. “Addendum” means supplemental information or changes made to an ITN after release of the original procurement document and before deadline for submission.

2. “Applicant” or “You” or “Organization” means the entity legally operating in the state of Florida that submits or intends to submit an Application to the CBHC pursuant to this procurement document.

3. “Application” means the written application submitted by an Applicant in response to this ITN.

4. “Best Practices” refers to methods or techniques that have consistently demonstrated evidence of results/accomplishments that are better than those achieved with other means and are used as a benchmark. These are often related to a set of guidelines established by an authority that recommends an efficient or prudent course of action in some situations.

5. “Capacity Building Training” means training provided at no cost to the organization if awarded to increase their access to resources that will strengthen organizational needs as identified by the organization for its staff and/or Board members.

6. “Collaboration” means agencies work together, each contributing its strength to a project, to create positive outcomes toward achieving one or more of the Children’s Board’s overall goals of Children are Healthy and Safe; Children are Ready to Learn and Succeed; and Family Support.

7. “Contract Compliance” means the Grantee successfully meets the expectations of managing a Children’s Board contract in three areas of responsibility: administrative, fiscal, and programmatic functions.

8. “Community Review Team” means the CBHC secured volunteer community reviewers who will read and rate applications.

9. “Cost Reimbursement” means the Grantee must pay for approved budget expenses before being reimbursed from the CBHC.

10. “Faith-Based Organization” is a nonprofit organization founded by a religious congregation or religiously-motivated incorporators and board members that clearly states in it name, incorporation, or mission statement that it is a religiously motivated institution. The organization must have 10 or fewer employees and an annual operating budget of $300,000 or less. [Adapted from the White House Office for Faith-Based and Community Initiatives and the 2002 Senior Corps survey of programs.]

11. “Fiscal Year” means the budget calendar year for the Children’s Board which is October 1 through September 30.

12. “Funding Workshop” is a presentation reviewing the details of the ITN as well as general discussion of how projects funded by this ITN will forward the Children’s Board’s intent to improve outcomes for children and families in Hillsborough County. All answers in question and answer session will be subject to review prior to approval, and official answers will be publicly posted on the Children’s Board’s website.
13. “General Terms and Conditions” refers to the General Terms and Conditions that will become part of the contract if funding is approved and awarded to an organization. Please read the General Terms and Conditions to be certain the applicant organization will be able to comply with all requirements.

14. “Glossary” The glossary of terms has been provided to clarify terms used in the ITN document. If you require additional clarification please submit written questions to the designated contact by the deadline indicated on the timeline.

15. “Grantee” means the selected organization awarded a contract upon Board approval with the Children’s Board to provide the Services.

16. “Grassroots Organization” is a nonprofit organization that is located in the same zip code as the people they serve. The organization must have 10 or fewer employees and an annual operating budget of $300,000 or less. [Adapted from the White House Office for Faith-Based and Community Initiatives and the 2002 Senior Corps survey of programs.]

17. “High Quality Services” are services that exceed both the minimal specifications of a service as well as the norm.

18. “Indicators” (or benchmarks) are measurable qualities of life help quantify the achievement of a result. Results and indicators are about the ends we want for children and families. And strategies and performance measures are about the means to get there.

19. “Intent to Negotiate (ITN)” means this Intent to Negotiate and includes any addendum and the answers to Applicants’ questions.

20. “Lead Agency” is the primary Applicant and fiscal agent for the program or project when multiple agencies are working together on one program or project.

21. “Matrix/ Work Plan” means the work plan that graphically lays out the project goal, the process objectives (what), activities (how), responsible parties (who), the outcomes (why), the indicators (measures/evidence), data sources (where), and time of measure (when). Please see tip sheet in the appendices.

22. “Outcomes” means measured results of your efforts that show change in an area of concern. They differ from “outputs” which, although important, do not show change but how much work is being done.

23. “Procurement” means a process or method to secure goods and services.

24. “Scope of Services” are the defined specifications, standards and requirements for services to be delivered under this procurement activity.

25. “Scoring Criteria” – The Scoring Criteria has been provided for information purposes only. It will be used by the members of the Community Review Team to score each application they read. It specifies the total number of possible points an application can receive under each category. Applications must receive a score of 70 or above to be considered for funding and all awards are subject to the availability of funds and Board approval.
26. “Sub-contract Organization” is an organization working in partnership with another or multiple agencies on a single program or project under a “Lead” agency.

27. “Sustainability Plan” means the basic plan to sustain your organization outside of this grant award.

28. “Volunteer” means an individual who assists the program on an intermittent basis without pay. Volunteers are under direct and constant supervision by program personnel or agency staff.

29. “Written Applicant Questions” means questions pertaining to the ITN and submitted to CBHCFundingRelease@ChildrensBoard.org. All questions are subject to review and answers to questions will be publicly posted on the website: http://www.childrensboard.org/budgeting/revenues-and-expenditures/funding-opportunities/ under the subheading of “open opportunities”.

Standards of Quality for Family Strengthening & Support

Developed by the California Network of Family Strengthening Networks
Adopted by the National Family Support Network

April 16, 2016 Edition
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Thanks to Judy Langford of the Center for the Study of Social Policy for reviewing these Standards for their incorporation of the Strengthening Families Approach.
THE SIGNIFICANCE OF FAMILIES

Families represent the foundation of a society. When families are healthy and strong, communities thrive. There are many kinds of families, and therefore, many definitions of “family.” People who are significant to one another, whether related by blood, legal bonds, or bonds of friendship and community, may identify themselves as a family. Ultimately, “family” is self-defined.

The focus of the Standards of Quality for Family Strengthening & Support is on families who are responsible for raising children. These families consist of at least one adult and one child who are related biologically, emotionally, or legally. Families may consist of one parent, two parents, grandparents, foster parents, legal guardians, or they may arise from a need for mutual support.

As the primary responsibility for the development and well-being of children lies within the family, all segments of society must support families as they raise their children. These Standards are offered as one way to ensure that families are supported. The Standards may also be applicable for working with individuals and family members of different ages across the lifespan.

THE IMPORTANCE OF STANDARDS

The development of shared standards is an important strategic step towards defining and promoting quality practice for families. The child care, health care, mental health, and education fields each has a structure, such as a set of standards, which provides practitioners with a shared definition of the elements required in quality practice. The Family Strengthening and Support field has long held a shared philosophy – the Principles of Family Support Practice developed by Family Support America, and more recently a key theory of change – the Center for the Study of Social Policy’s Strengthening Families: A Protective Factors Framework. Yet, the field has not had one shared set of standards that operationalizes these frameworks.

The California Network of Family Strengthening Networks created the Standards of Quality for Family Strengthening & Support to define how the Principles of Family Support Practice and the Strengthening Families Framework with its research-based evidence informed Protective Factors can be applied together programmatically. Five key areas of practice are identified with their associated standards, indicators, and implementation examples.

These Standards establish a common language to promote quality practice across many different kinds of programs that work with families.

What makes these Standards unique is that they are the first to integrate and operationalize both THE PRINCIPLES OF FAMILY SUPPORT PRACTICE and the research-based evidence-informed STRENGTHENING FAMILIES PROTECTIVE FACTORS FRAMEWORK.
Utilizing the Standards of Quality

The Standards of Quality for Family Strengthening & Support are designed to be used by all Family Strengthening and Support stakeholders as a tool for planning, providing, and assessing quality services.

Some examples of the ways various stakeholders can utilize the Standards include:

**FAMILY STRENGTHENING AND SUPPORT PROGRAMS** can use the Standards as a blueprint for implementing best practices, whether they are setting up a new Program or strengthening an existing one. Programs can use the Standards for self-assessment and to demonstrate the quality of their work with families.

**DIRECT SERVICE STAFF** can use the Standards to reflect on and enhance their work with families.

**NETWORKS OF FAMILY STRENGTHENING AND SUPPORT PROVIDERS** can use the Standards as a tool for quality assurance and capacity building for network members. Networks can adopt the Standards as a criteria for membership.

**POLICY MAKERS** can endorse the Standards for application in their areas of influence.

**FUNDERS** can adopt the Standards for use in requests for proposals, program monitoring, and quality assurance.

**FAMILIES** can partner with Programs to apply the Standards. Families can provide feedback about how well a Program is applying the Standards.
THE DEVELOPMENT PROCESS OF THE STANDARDS OF QUALITY

The California Network of Family Strengthening Networks was founded in 2009. Its mission is to connect family strengthening networks across California to promote quality practice, peer learning, and mutual support.

The Standards of Quality for Family Strengthening & Support were developed by the California Network of Family Strengthening Networks from the successfully implemented San Francisco Family Support Network Family Support Standards that were created in 2007. The Standards Development Committee, whose diverse members represented networks across the state – urban and rural, large and small, met for a year and a half to create the new Standards.

As part of the transparent and inclusive development process, the Standards were vetted twice by the entire membership of the California Network of Family Strengthening Networks, which included the networks vetting them with their own members. Additionally, they were pilot-tested for feedback from direct service staff in one urban and two rural counties. In total, nearly 1,000 Family Strengthening and Support organizations were engaged in reviewing the Standards.

The development process not only yielded rich feedback and significant helpful input, but also ensured that the Standards would be accessible, understandable, and applicable to multiple audiences. Ultimately, the Standards were unanimously approved by the California Network of Family Strengthening Networks membership in 2012.

THE INTEGRATION OF FRAMEWORKS

The Standards of Quality for Family Strengthening & Support are built upon, and reflect, a unique integration of the following Principles of Family Support Practice and the Strengthening Families Approach with its Protective Factors Framework. Because the Standards of Quality for Family Strengthening & Support emphasize working with the whole family, the language throughout the Standards reflects building supports and protective factors for all family members.
FAMILY SUPPORT IS ALL OF THE FOLLOWING:

• An approach to strengthening families and communities so that they can foster the optimal development of children, youth, and adult family members.

• A type of grassroots, community-based program designed to prevent family problems by strengthening parent-child relationships and supporting parents to be good nurturers and providers.

• A shift in human services delivery that encourages public and private agencies to work in partnership with families to become more preventative, responsive, flexible, family-focused, strengths-based, holistic, and effective.

• A movement for social change that urges policymakers, service providers, parents, and employers to take responsibility for improving the lives of children and families and for ensuring that they get what they need to succeed.

Family Support is based on the premise that the primary responsibility for the development and well-being of children lies within the family, and that all segments of society must support families as they raise their children. Family Support services include a broad array of activities designed to strengthen families. They help parents to raise their children successfully, to become self-sufficient, and to take an active role in their communities.

*Adapted from a definition by Family Support America*
THE PRINCIPLES OF FAMILY SUPPORT PRACTICE

1. Staff and families work together in relationships based on equality and respect.

2. Staff enhances families’ capacity to support the growth and development of all family members – adults, youth, and children.

3. Families are resources to their own members, to other families, to Programs, and to communities.

4. Programs affirm and strengthen families’ cultural, racial, and linguistic identities and enhance their ability to function in a multicultural society.

5. Programs are embedded in their communities and contribute to the community-building process.

6. Programs advocate with families for services and systems that are fair, responsive, and accountable to the families served.

7. Practitioners work with families to mobilize formal and informal resources to support family development.

8. Programs are flexible and continually responsive to emerging family and community issues.

9. Principles of family support are modeled in all Program activities, including planning, governance, and administration.

Source: Family Support America
Developed by the Center for the Study of Social Policy in 2005, the Strengthening Families Approach focuses on building the following 5 Protective Factors with families. Research has shown that these 5 Protective Factors increase family stability, enhance child development, and reduce child abuse and neglect.

THE PROTECTIVE FACTORS FRAMEWORK

PARENTAL RESILIENCE
No one can eliminate stress from parenting, but a parent’s capacity for resilience can affect how a parent deals with stress. Resilience is the ability to manage and bounce back from all types of challenges that emerge in every family’s life. It means finding ways to solve problems, building and sustaining trusting relationships, including relationships with your own child, and knowing how to seek help when necessary.

KNOWLEDGE OF PARENTING AND CHILD DEVELOPMENT
Accurate information about child development and appropriate expectations for children’s behavior at every age helps parents see their children and youth in a positive light and promote their healthy development. Studies show information is most effective when it comes at the precise time parents need it to understand their own children. Parents who experienced harsh discipline or other negative childhood experiences may need extra help to change the parenting patterns they learned as children.

SOCIAL CONNECTIONS
Friends, family members, neighbors and community members provide emotional support, help solve problems, offer parenting advice and give concrete assistance to parents. Networks of support are essential to parents and also offer opportunities for people to “give back”, an important part of self-esteem as well as a benefit for the community. Isolated families may need extra help in reaching out to build positive relationships.

SOCIAL AND EMOTIONAL COMPETENCE OF CHILDREN
A child or youth’s ability to interact positively with others, self-regulate their behavior and effectively communicate their feelings has a positive impact on their relationships with their family, other adults, and peers. Challenging behavior or delayed development creates extra stress for families, so early identification and assistance for both parents and children can head off negative results and keep development on track.

CONCRETE SUPPORT IN TIMES OF NEED
Meeting basic economic needs like food, shelter, clothing and health care is essential for families to thrive. Likewise, when families encounter a crisis such as domestic violence, mental illness or substance abuse, adequate services and supports need to be in place to provide stability, treatment and help for family members to get through the crisis.
STRATEGIES FOR BUILDING THE 5 PROTECTIVE FACTORS

Programs can employ the following 7 strategies to build the 5 Protective Factors in families:

1. Facilitate friendships and mutual support
2. Strengthen parenting
3. Respond to family crises
4. Link families to services and opportunities
5. Value and support parents
6. Facilitate the social and emotional development of children
7. Observe and respond to early warning signs of child abuse or neglect

For more information on the Strengthening Families Approach, please see www.cssp.org/reform/strengthening-families.
The Standards of Quality for Family Strengthening & Support have 5 sections with 17 standards, each with a set of indicators and implementation examples.

The 5 sections of the Standards are:

- **Family Centeredness**
  Working with a family-centered approach that values and recognizes families as integral to the Program.

- **Family Strengthening**
  Utilizing a family strengthening approach to support families to be strong, healthy, and safe, thereby promoting their optimal development.

- **Embracing Diversity**
  Acknowledging and respecting families’ diversity, supporting their participation in a diverse society, as well as engaging in ongoing learning and adaptation to diversity.

- **Community Building**
  Contributing to building a strong and healthy community by facilitating families’ social connections, developing their leadership skills, and by collaborating with other Programs.

- **Evaluation**
  Looking at areas of Program strength, as well as areas for further development, in order to guide continuous quality improvement and achieve positive results for families.
INDICATORS

Each Standard includes 1-2 pairs of indicators of both minimum quality and high quality. The Minimum Quality Indictors demonstrate the basic application of the Standard. Programs build upon the Minimum Quality Indicators to achieve the High Quality Indicators, which represent an ongoing and deeper commitment to the application of the Standard.

ARROW 1

Arrow 1 is used for the Family Centeredness, Family Strengthening, Embracing Diversity and Community Building sections to illustrate the elements necessary to move from Minimum Quality to High Quality. Each of the elements helps ensure the Standards are more deeply integrated into program practice.

High Quality Indicators include the following elements. The particular elements and the number of elements needed differ for various High Quality Indicators.

• **Formal Structure**: Program has a formal structure for the implementation of the Standard – design, policies, procedures, systemic integration, and intentional strategies with committed resources that ensure consistency of practice.

• **Staff Training**: Program ensures that staff members receive appropriate training to support the implementation of the Standard.

• **Family Partnership**: Program partners with families in the implementation of the Standard.

For these Sections:

• Family Centeredness
• Family Strengthening
• Embracing Diversity
• Community Building

One or more of the elements in the arrow moves a Program from:

**ARROW 1**

- FORMAL STRUCTURE
- STAFF TRAINING
- FAMILY PARTNERSHIP

*Foundational*  
*Deeper integration*
EVALUATION SECTION ARROW

The Evaluation section uses Arrow 2 to illustrate the move from Minimum Quality to High Quality. High Quality Indicators include the following elements. The particular elements and the number of elements needed differ for various High Quality Indicators.

- **Data Analysis:** Program reviews and interprets data related to program participation, quality, and outcomes. Program may look at both quantitative data and qualitative data, such as case studies.

- **Sharing Evaluation Results:** Program shares evaluation data and results with families, staff members, and other key stakeholders.

- **Program Modification:** Program makes modifications as a result of evaluation to ensure its continuous quality improvement. This process helps the Program to meet the unique and changing needs of the community or population served.

- **Training for Evaluation Integration:** Program ensures that staff members receive appropriate training for the integration of evaluation processes into their practices.

One or more of the elements in the arrow moves a Program from:

ARROW 2

MINIMUM QUALITY INDICATOR
- DATA ANALYSIS
- SHARING EVALUATION RESULTS
- PROGRAM MODIFICATION
- TRAINING FOR EVALUATION INTEGRATION

Foundational

HIGH QUALITY INDICATOR

Deeper integration

ELEMENTS IN THE INDICATORS

Italicized bold print has been used to highlight the elements present in the High Quality Indicators.

EXAMPLES

In order to illustrate how the Indicators are applied, some examples from the field have been included. The examples show some or all of the components of the Indicators. **These 2-4 examples, some general, some specific, are not meant to be an exhaustive list or a specific checklist.** As Programs apply the Standards, they are encouraged to identify their own examples that demonstrate the Indicators in ways that are relevant to their communities.
Meeting the Minimum Quality indicators will create a Family Strengthening and Support Program with a solid foundation. Programs are encouraged to strive to meet the High Quality Indicators in order to serve families most effectively.

The Minimum Quality Indicators are designed to be met within a reasonable scope of resources of a Family Strengthening and Support Program. Some High Quality Indicators may require capacity building and more investment to meet.

Implementing the Standards is a developmental process. It is common that Programs see aspects of their work on different points along a continuum from Minimum Quality to High Quality.

Successful application of the Standards requires the commitment and support of all levels of Program responsibility – executive directors, managers, coordinators, direct service staff, parent leaders, and families. Each has a key role to play.

CERTIFICATION TRAINING

Training is a fundamental strategy for implementing the Standards effectively. As such, the California Network of Family Strengthening Networks trains representatives of member networks to be able to offer certification trainings on the Standards. These trainings are designed for all management and direct service staff, as well as for funders. Each individual who completes the training receives a certificate from the California Network of Family Strengthening Networks that is valid for 2 years.

IMPLEMENTATION TOOLS

The Standards document is part of a suite of materials designed to support Programs to implement the Standards effectively. These materials include:

- **Program Self-Assessment Tool** - designed to be used as a critical thinking exercise by Program teams of managers, direct service staff, parent leaders, and other stakeholders as appropriate.

- **Staff Self-Reflection Checklist** - a set of 15 self-reflection questions for staff members to use as a daily reminder to implement the Standards.

- **Standards Participant Survey** - a set of 14 questions for Program participants to indicate how well the Program is meeting the Standards from their perspective. The tool is available in English, Spanish, and Chinese.
Families are valued as integral to the Program. Families are involved in the planning, development, and implementation of the Program. Activities and services are developed in response to the needs and interests of families. The Program is accessible and welcoming to families.

The Program conducts outreach with families. Staff members develop and sustain constructive relationships with families.

The Program models family centeredness with staff members and in its administrative practices. The Program considers staff members’ own family needs and interests, such as child care, flexible schedules for working parents, and dependent benefits.

This section reflects Family Support Principles 1 and 9, and the following Protective Factors: Social Connections, Concrete Support in Times of Need, and Social and Emotional Competence of Children.

Standard FC.1
Program encourages families to participate in Program development and implementation.

Standard FC.2
Program is accessible and welcoming to families.

Standard FC.3
Program conducts outreach to families and sustains constructive relationships with them.

Standard FC.4
Program models family centeredness with staff members and in its administrative practices.
Standard FC.1 – Program encourages families to participate in program development and implementation.

FC. 1.1 Minimum Quality Indicator
Program solicits input from families to shape and plan the Program and services.

Some examples may include:

- Methods of collecting input from families are used, such as surveys, focus groups, and interviews.
- Staff members survey participants to determine which workshop topics they would like the Program to offer.
- Program welcomes participants to use a suggestion box to provide ideas and feedback.

FC. 1.1 High Quality Indicator
Program’s design supports partnering with families to have an active role in the development and implementation of the Program.

Some examples may include:

- Program has a Parent Advisory Committee which meets regularly and impacts program development.
- Participants are trained to facilitate or co-facilitate with staff members a support group or parenting class.
- Participants are included in an employee hiring process, such as by helping to identify the skills and qualities needed for the job, and by participating on an interview panel.
Standard FC.2 – Program is accessible and welcoming to families.

**FC. 2.1 Minimum Quality Indicator**
Program offers services at an accessible place and time convenient to families.

Some examples may include:

- Program’s regular hours of operation are convenient for families.
- Program is located in a space that is readily accessible to families by public transportation or walking.
- Program space is accessible for people using wheelchairs or strollers.
- Program provides child care space for families during a parenting workshop.

**FC. 2.1 High Quality Indicator**
Program is **structured** to increase its accessibility, in order to meet the unique needs or circumstances of families.

Some examples may include:

- Program implements a policy to extend its hours of operation to support families during crises.
- Program conducts home visits to reach families when they cannot travel to the Program site.
- Program provides resources and support for staff members to meet with families at locations convenient to them, such as hospitals, schools, and places of worship.
- Program provides transportation to the Program location.
FAMILY CENTEREDNESS

Standard FC.2 – Program is accessible and welcoming to families. (continued)

**FC. 2.2 Minimum Quality Indicator**
Program creates a welcoming environment for families.

**Some examples may include:**

- Staff members greet families in a helpful and welcoming way.

- Program has a well-maintained and child-safe service area.

- Program’s mission, expressed in language readily understood by families, is displayed in its reception area.

- Posters and resource materials in the reception area reflect the diversity of the families served.

**FC. 2.2 High Quality Indicator**
Program *partners with families* to develop and maintain a welcoming environment for families, promoting their sense of ownership of the Program.

**Some examples may include:**

- Families maintain the Program playroom.

- Families are involved in making improvements to the Program environment.

- Program recruits participants who are fathers to greet other fathers at program activities.
Standard FC.3 – Program conducts outreach to families and sustains constructive relationships with them.

**FC. 3.1 Minimum Quality Indicator**
Program provides outreach and information to potential participants.

Some examples may include:
- Staff members conduct door-to-door outreach to families in the community.
- Program provides brochures and fliers about its services and activities at the Program site.
- Program has a booth at a community fair.

**FC. 3.1 High Quality Indicator**
Program implements an outreach plan for potential participants with intentional strategies and committed resources.

Some examples may include:
- Staff members are trained to do outreach to underserved families.
- Program conducts home visits as part of an outreach plan to connect with isolated families.
- Program plans, develops, and conducts a social media campaign.
- Program trains and supports participants to do peer-to-peer outreach at schools, WIC offices, and community gathering places, such as laundromats and soccer games.
FAMILY CENTEREDNESS

Standard FC.3 – Program conducts outreach to families and sustains constructive relationships with them. (continued)

**FC. 3.2 Minimum Quality Indicator**

Program maintains constructive relationships with families.

_Some examples may include:_

- Staff members are consistently warm and respectful, fostering a sense of participants’ belonging.
- Participants who complete a program activity are encouraged to participate in other activities.
- Staff members learn family members’ names and ask about their well-being.

**FC. 3.2 High Quality Indicator**

Program _implements a system_ to sustain constructive relationships with families.

_Some examples may include:_

- Staff members are trained to follow up with families who have completed a service activity.
- Program implements an outreach strategy to invite and engage past participants in new program activities.
- Program intentionally develops parents as leaders in the Program.
FAMILY CENTEREDNESS

Standard FC.4 – Program models family centeredness with staff members and in its administrative practices.

FC. 4.1 Minimum Quality Indicator
Program demonstrates that it considers the family needs and interests of staff members.

Some examples may include:

• Program tries to schedule staff retreats and trainings so that they do not conflict with family time.

• Staff members are sometimes invited to bring their families to Program holiday activities.

• Staff members are asked about their own family needs, such as child care.

FC. 4.1 High Quality Indicator
Program implements policies, procedures, and benefits that address the family needs and family interests of staff members.

Some examples may include:

• Program has a flexible schedule system for staff members to accommodate working families.

• Program has a policy that staff members and their families are welcome to participate in skill-based trainings offered by the Program, such as parenting education and financial management.

• Program provides a menu of benefits to address various family needs, such as medical allowances, and pre-tax flexible spending accounts for child care needs.
The Program, in partnership with families, builds the 5 Protective Factors of the Strengthening Families Approach and other developmental assets throughout the life cycle of the family.

The Protective Factors Framework supports families to be strong, healthy, and safe. The Program uses this framework to enhance families’ capacity to understand and promote their own optimal cognitive, social, emotional, and physical development.

Staff and families form a mutually respectful partnership by bringing together their strengths and skills to address issues and create opportunities for success. The Program uses a strengths-based approach, which focuses on families’ assets and abilities, as well as their needs and interests. This is a shift away from a deficit approach in which staff members are expected to be the “experts” fixing “problem” families.

Recognizing families as significant resources for each other, the Program facilitates opportunities for families to build relationships for mutual and peer support. Services and activities are designed to include the whole family rather than an individual member. This supports better outcomes for children and caregivers.

This section reflects Family Support Principles 1, 2, 3, and 7, and all of the 5 Protective Factors.

Standard FS.1
Program recognizes and affirms families’ strengths and resilience, and is responsive to their concerns and priorities.

Standard FS.2
Program enhances families’ capacity to support the healthy cognitive, social, emotional, and physical development of their family members.

Standard FS.3
Program recognizes families as significant resources for their own family members and each other.
Standard FS.1 – Program recognizes and affirms families’ strengths and resilience, and is responsive to their concerns and priorities.

**FS. 1.1 Minimum Quality Indicator**

Staff members work with family members in relationships based on equality and respect, to identify their strengths, resilience, and resources.

Some examples may include:

- Staff members comment on a positive interaction between a parent and his/her child during a playgroup.
- Families are informed that all staff members will honor their privacy and confidentiality, within the confines of the law.
- Staff members celebrate and recognize families’ achievements.

**FS. 1.1 High Quality Indicator**

Staff members, working with family members in relationships based on equality and respect, implement a formal process to assess and document families’ strengths, resilience, and resources.

Some examples may include:

- Staff members are trained to recognize and document family resilience and strengths.
- Staff members conduct intake interviews with participants using tools that indicate family strengths.
- Program has methods of assessment to help families identify their resources and strengths to handle a crisis.
Standard FS.1 – Program recognizes and affirms families’ strengths and resilience, and is responsive to their concerns and priorities. (continued)

FS. 1.2 – Minimum Quality Indicator
Program engages families to identify their concerns, priorities, and resource needs. It links families with service providers, informal supports, or other families to address them.

Some examples may include:

- Staff members talk with families about their priorities and make referrals as needed.
- Program encourages families to carpool with one another to get to an activity.
- Program provides a resource list to families seeking elder care support.
- Program links eligible families to an Earned Income Tax Credit provider.

FS. 1.2 High Quality Indicator
Program implements a formal process to gather information about families’ concerns, priorities, and resource needs. Program partners with families to set goals. It formally facilitates families’ access to services and activities, and has a system to provide them with follow-up support.

Some examples may include:

- Staff members work with families to complete assessment tools that include family-identified needs and goals.
- Staff members partner with families to develop service plans, and periodically meet with them to review progress towards their goals.
- Staff members are trained to provide enhanced information and referral services to families as part of a formal referral system.
Standard FS.2 – Program enhances families’ capacity to support the healthy cognitive, social, emotional, and physical development of their family members.

**FS. 2.1 Minimum Quality Indicator**

Staff members can demonstrate an understanding of healthy family development.

*Some examples may include:*

- Staff members demonstrate an understanding of the stages of child development by supporting parents to have appropriate age expectations.

- Staff members can describe the significance of healthy couple relationships in the context of strengthening families.

- Staff members can identify risk factors and potential warning signs of abuse and neglect.

**FS. 2.1 High Quality Indicator**

Program provides staff members with opportunities to strengthen their knowledge and skills for supporting healthy family development.

*Some examples may include:*

- Program connects staff members with professional development opportunities to enhance their understanding of child and youth development.

- Program provides opportunities, such as clinical supervision or team meetings, for staff members to learn about partnering with families to develop healthy couples relationships.

- Staff members receive training on working with parents to prevent childhood obesity.
Standard FS.2 – Program enhances families’ capacity to support the healthy cognitive, social, emotional, and physical development of their family members. (continued)

FS. 2.2 – Minimum Quality Indicator
Program shares information with families to support their healthy development.

Some examples may include:

- Program has information about child development, such as ages and stages brochures and books available to families.

- Program provides tip sheets to parents on how to talk with their teens.

- Program newsletter includes an article about, and resources for, healthy couples relationships.

- Program refers families to community recreational centers for physical activities.

FS. 2.2 High Quality Indicator
Program is designed to deliver activities that support the healthy development of families.

Some examples may include:

- Program provides evidence-based parenting education classes.

- Program designs and offers workshops on developing parent-teen communication skills.

- Program provides workshops on healthy couple relationships, such as communication, healthy marriage, and co-parenting.

- Program develops and provides activities to increase families’ physical activity.
Standard FS.3 – Program recognizes families as significant resources for their own family members and each other.

**FS. 3.1 Minimum Quality Indicator**

Program recognizes the importance of engaging multiple family members, and encourages their participation in program activities.

*Some examples may include:*

- Staff members ask participants if they have other family members who could be invited to program activities.

- Program fliers indicate that multiple family members are welcome.

- Program provides adequate space to accommodate multiple family members in activities.

**FS. 3.1 High Quality Indicator**

Program *designs* and provides activities, events, and services that successfully engage multiple family members.

*Some examples may include:*

- Program engages multiple family members in activities and events, such as a Halloween party, Family Literacy Night, and Family Movie Night.

- Program records indicate participation in activities and services designed for a range of family members, such as fathers, partners, grandparents, and godparents.

- Program develops outreach strategies that engage key family members as defined by the family.
Standard FS.3 – Program recognizes families as significant resources for their own family members and each other. (continued)

FS. 3.2 Minimum Quality Indicator
Program facilitates opportunities for families to build social connections with each other for resource sharing and mutual support.

Some examples may include:

- Staff members warmly introduce families to each other.
- Program hosts potlucks for families to get to know each other.
- Program provides space for young people to play games and sports together.
- Program provides a support group.

FS. 3.2 High Quality Indicator
Program facilitates families to create their own opportunities to build social connections with each other for resource sharing and mutual support.

Some examples may include:

- Program welcomes and encourages participants to share their skills with each other, by conducting participant-led cooking or arts and crafts activities.
- Program engages parents to develop their own mutual support systems, such as phone trees, shared child care, co-ops, carpools and playgroups.
- Program invites fathers on the Parent Advisory Committee to plan an event together, such as a Father’s Day celebration, to increase social connections among fathers in the Program.
The diversity of families encompasses their cultural traditions, languages, values, socio-economic status, family structures, sexual orientation, religion, individual abilities, and other aspects. The Program sees the diversity of families as both an important part of their identities and as a form of strength.

The Program acknowledges and respects the diversity of families and recognizes that this diversity is multi-layered – even families with similar backgrounds may differ in numerous ways. The Program addresses these multiple layers, for example, by being responsive to language, family structure, and traditions.

In order to thrive and fully participate in a diverse society, both staff members and families need the ability to interact respectfully and meaningfully with those who are different from them. Navigating the dynamics of difference involves understanding, empathy, listening, self-awareness, recognizing and addressing conflict, and being aware of systemic inequalities.¹

The Program that effectively embraces diversity understands that it is an ongoing developmental journey for both individuals and organizations. The Program has an ongoing commitment to learn about and adapt to the diversity of the families they serve.²

2. Lindsey, Robins, and Terrell.

This section reflects Family Support Principle 4, and the following Protective Factors: Parental Resilience and Social Connections.

Standard ED.1
Program acknowledges and respects the diversity of families, including their cultural traditions, languages, values, socio-economic status, family structures, sexual orientation, religion, individual abilities, and other aspects.

Standard ED.2
Program enhances the ability of families and staff to participate in a diverse society and to navigate the dynamics of difference.

Standard ED.3
Program engages in ongoing learning and adaptation of its practices to address diversity.
EMBRACING DIVERSITY

Standard ED.1 – Program acknowledges and respects the diversity of families, including their cultural traditions, languages, values, socio-economic status, family structures, sexual orientation, religion, individual abilities, and other aspects.

ED. 1.1 Minimum Quality Indicator
Program demonstrates awareness of, and reflects the diversity of, families served.

Some examples may include:

• Program materials are written in the language(s) of the families served.

• Fliers, posters and brochures feature images of the families served and are culturally relevant.

• Services are offered in the language(s) of the families served, either by staff members who speak the languages or through an interpreter.

• Program calendar includes cultural celebrations of the families served.

ED. 1.1 High Quality Indicator
Program utilizes formal structures and policies that demonstrate awareness of, and reflect the diversity of, families served.

Some examples may include:

• Program intentionally recruits and employs staff members who reflect, and are skilled at working with, the diversity of the populations’ served.

• Program implements a peer education model to train community members to share culturally relevant information with hard-to-reach communities.

• Program has a policy that outreach materials are reviewed by the Parent Advisory Committee prior to printing, in order to ensure that they are culturally relevant and linguistically accessible.

• Program develops and implements a policy for potluck events that includes multiple ways that families can contribute, whether or not they can afford to share food.
Standard ED.1 – Program acknowledges and respects the diversity of families, including their cultural traditions, languages, values, socio-economic status, family structures, sexual orientation, religion, individual abilities, and other aspects. (continued)

**ED. 1.2 Minimum Quality Indicator**

Program demonstrates awareness of, and reflects multiple layers of, the diversity of families served.

*Some examples may include:*

- In addition to program materials in the language(s) of the families served, the wording is targeted to welcome mothers, fathers, and grandparents.

- Images in fliers, posters, and brochures feature multiple aspects of diversity within a population, such as various family structures.

- Program is mindful not to schedule activities that conflict with key religious observances in the community.

**ED. 1.2 High Quality Indicator**

Program utilizes formal structures and policies to reflect multiple layers of the diversity of families served.

*Some examples may include:*

- Program intentionally employs a variety of staff members skilled at working with and reflecting multiple aspects of the diversity of the population(s) served, such as both males and females, and both parents and grandparents.

- Program intake forms recognize and reflect the variety of family structures, such as single parents, kinship caregivers, foster parents, and gay and lesbian families.

- Parent Advisory Committee is designed to represent multiple aspects of the diversity of the population(s) served, such as mothers, fathers, and grandparents.
EMBRACING DIVERSITY

Standard ED.2 – Program enhances the ability of families and staff to participate in a diverse society and to navigate the dynamics of difference.

ED. 2.1 Minimum Quality Indicator

Program offers opportunities for families to learn about diversity, and to navigate the dynamics of difference.

Some examples may include:

- Program distributes fliers about diverse community events, in order to promote family participation.

- Program encourages family participation in activities that engage diverse communities such as dance classes, block parties, sports, arts, and community gardening.

- A staff member helps a parent without a special needs child to understand why the Program makes accommodations for families who have special needs children.

ED. 2.1 High Quality Indicator

Program implements formal structures to support families to learn about diversity, and to navigate the dynamics of difference.

Some examples may include:

- Program partners with parents to design and organize a parent café series to encourage the sharing of diverse cultural perspectives on parenting practices.

- Program designs intergenerational reading and visiting activities to promote the sharing of experience and wisdom between youth and elders.

- Program develops a community dialog process to explore Western medicine and traditional healing practices, with the goal of bridging cultural divides.

- Program organizes field trips for families to attend events hosted by communities different from theirs.
ED. 2 Minimum Quality Indicator
Program offers opportunities for staff members to learn about diversity, and to navigate the dynamics of difference.

Some examples may include:

- Staff members are encouraged to share past work or life experiences with each other that foster mutual understanding.

- Program encourages staff members to seek advice from community elders on how to reach out to families in a culturally appropriate way.

- Program provides an opportunity for a brown-bag lunch that brings staff members together for the purpose of sharing and valuing differences.

ED. 2.2 High Quality Indicator
Program provides professional development to support staff members to learn about diversity, and to navigate the dynamics of difference.

Some examples may include:

- Program invites partner organizations to provide workshops for staff on diversity issues.

- Program organizes a site visit for staff members to an organization that serves a different community, with the purpose of learning about how to serve that population.

- Program develops and implements a policy that staff members regularly participate in trainings on diversity.

- Program facilitates a series of ongoing discussions to help staff members understand and appreciate their culturally different communication styles.
Standard ED.3 – Program engages in ongoing learning and adaptation of its practices to address diversity.

**ED. 3.1 Minimum Quality Indicator**

Program learns about and adapts to the diversity of families on an ongoing basis.

Some examples may include:

- Staff members ask families questions that increase their understanding of the families’ diverse norms and preferences.

- Staff members discuss identifying and addressing the various aspects of diversity that exist within the surrounding community.

- Program learns about accommodations needed to include a blind parent in a parenting support group.

**ED. 3.1 High Quality Indicator**

Program *implements formal systems and practices* to learn about and adapt to the diversity of families on an ongoing basis.

Some examples may include:

- Through a reflective process, the Program develops and executes an action plan to incorporate multiple aspects of the diversity of the families served.

- Staff members are trained how to interview families to increase their understanding of families’ diverse norms and values.

- Program conducts a community assessment process to identify aspects of diversity that exist within the area served, in order to strengthen outreach efforts.
Families thrive in strong and healthy communities, and they have a crucial role in developing these communities. When families build social connections with each other for resource sharing and mutual support, they begin to move along a continuum from being focused on their own families to supporting other families. The next step in this development is families collectively taking an active role in the larger community.

The Program makes a vital contribution to build strong and healthy communities. It is aware of community issues and priorities. It is committed to developing community leadership, supporting families to develop skills and to effect meaningful community change. The Program assists families to identify opportunities to develop and exercise their leadership capacity to address common issues, and to create a connected community.

The Program develops, participates in, and leverages collaborative partnerships and networks with various stakeholders to strengthen neighborhoods and communities.

*This section reflects Family Support Principles 5 and 6, and the following Protective Factors: Social Connections and Concrete Support in Times of Need.*

**Standard CB.1**
Program is involved in, and engages families in, the larger community building process.

**Standard CB.2**
Program supports the development of community-based leadership.

**Standard CB.3**
Program builds collaborative relationships with other organizations to strengthen families and communities.
COMMUNITY BUILDING

Standard CB.1 – Program is involved in, and engages families in, the larger community building process.

CB. 1.1 Minimum Quality Indicator
Program is aware of, and provides families with, information about community issues and activities.

Some examples may include:

- Program provides information about community issues through a community news bulletin board.
- A staff member attends a community meeting regarding truancy.
- Program distributes fliers about community fairs.

CB. 1.1 High Quality Indicator
Program has a formal structure involved in addressing community needs and priorities.

Some examples may include:

- Program engages stakeholders, such as partner Programs and families, in an asset-mapping activity to address low-income housing development.
- A staff member serves on a community truancy task force and reports about it regularly at staff meetings.
- Program implements a strategy for staff members to work within appropriate legal parameters to advocate with families for needed policy changes.
COMMUNITY BUILDING

Standard CB.1 – Program is involved in, and engages families in, the larger community building process. (continued)

CB. 1.2 Minimum Quality Indicator

Program connects families to community events that help raise awareness of emerging community needs and assets.

Some examples may include:

- Program distributes fliers about a town hall meeting held by the city to address safety concerns.
- Program publicizes upcoming candidate forums to families.
- Program links families to a Neighborhood Watch group by providing a meeting space for it.

CB. 1.2 High Quality Indicator

Program formally facilitates the sharing of family voices for community impact.

Some examples may include:

- Program includes families and other community members in a planning process to develop a school safety program.
- Program conducts focus groups with community members in order to gather their input to inform local child abuse prevention efforts.
- Program organizes a forum with families and elected officials to address a community issue.
COMMUNITY BUILDING

Standard CB.2 – Program supports the development of community-based leadership.

**CB. 2.1 Minimum Quality Indicator**
Program shares information with families about how to advocate for their needs and priorities.

**Some examples may include:**
- Staff members provide information to families on how to understand and navigate systems, such as schools, mental health, and government departments.
- Program provides materials to parents about understanding their legal rights.
- Program invites a presenter to conduct a workshop for families on how to access healthcare.

**CB. 2.1 High Quality Indicator**
Program implements a formal structure to partner with families to develop their leadership skills, and to facilitate opportunities for using those skills in the community.

**Some examples may include:**
- Staff members are trained and supported to facilitate the leadership development of families, including providing ongoing encouragement, skill building, and knowledge development.
- Program trains parents through a series of workshops to understand, and to advocate for, their children’s educational rights.
- Families are trained and supported to serve in Program leadership roles, such as becoming members of the Parent Advisory Committee or Board of Directors.

- formal structure
- family partnership
COMMUNITY BUILDING

Standard CB.3 – Program builds collaborative relationships with other organizations to strengthen families and communities.

CB. 3.1 Minimum Quality Indicator
Program is aware of, and works with, other service providers and community organizations to share resources and information.

Some examples may include:

- Staff members introduce themselves to, and familiarize themselves with, other service providers.
- Staff members participate in meetings with other service providers.
- Program informs families and staff members about organizations that provide services in a family’s preferred language.

CB. 3.1 High Quality Indicator
Program creates formal partnerships with other service providers and community organizations to collaboratively strengthen families and communities.

Some examples may include:

- Program develops collaborative partnerships to provide a continuum of care for homeless families that addresses service gaps and avoids duplication.
- Program works in partnership with other organizations to develop initiatives to address emerging community issues.
Evaluation is the ongoing process of assessing what works and what needs to be modified. Evaluation is an important part of regular program planning, program implementation, and achieving positive results for families. Effective evaluation collects and combines data on program participation, quality, and outcomes.

Family Strengthening and Support evaluation incorporates families as partners in the process. The Program collects and shares evaluation data in partnership with staff members, families, and stakeholders to ensure that it produces meaningful results.

The Program demonstrates a commitment and capacity to incorporate evaluation as a core component of programming. The Program develops key evaluation questions to be answered. The Program builds internal resources and develops a plan for evaluation and continuous feedback.

This section reflects Family Support Principles 8 and 9, and aligns with the Strengthening Families Approach and the Protective Factors Framework.

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**Standard E.1**
Program collects and analyzes information related to program participation.

**Standard E.2**
Program collects and analyzes information related to program quality.

**Standard E.3**
Program collects and analyzes information related to program outcomes.

**Standard E.4**
Program demonstrates that it incorporates evaluation as a core component of programming.
The Evaluation section uses Arrow 2 to illustrate the move from Minimum Quality to High Quality. High Quality Indicators include the following elements. The particular elements and the number of elements needed differ for various High Quality Indicators.

- **Data Analysis**: Program reviews and interprets data related to program participation, quality, and outcomes. Program may look at both quantitative data and qualitative data, such as case studies.

- **Sharing Evaluation Results**: Program shares evaluation data and results with families, staff members, and other key stakeholders.

- **Program Modification**: Program makes modifications as a result of evaluation to ensure its continuous quality improvement. This process helps the Program to meet the unique and changing needs of the community or population served.

- **Training for Evaluation Integration**: Program ensures that staff members receive appropriate training for the integration of evaluation processes into their practices.

One or more of the elements in the arrow moves a Program from:

**ARROW 2**

<table>
<thead>
<tr>
<th>Minimum Quality Indicator</th>
<th>High Quality Indicator</th>
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<tbody>
<tr>
<td>Data Analysis</td>
<td>Sharing Evaluation Results</td>
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<tr>
<td>Program Modification</td>
<td>Training for Evaluation Integration</td>
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</table>

*Foundational*  
*Deeper integration*
Standard E.1 – Program collects and analyzes information related to program participation.

E. 1.1 Minimum Quality Indicator
Program tracks program activities, participant characteristics, and service utilization.

Some examples may include:
- Program uses a sign-in sheet for program activities.
- Program records progress toward contract/grant participation targets.
- Program records information about program services, such as the number of hours of service, the number of referrals families connect with, and case plans.

E. 1.1 High Quality Indicator
Program tracks and intentionally analyzes program activities, participant characteristics, and service utilization in relation to its goals, objectives, and community needs. Appropriate program modifications are made as a result.

Some examples may include:
- Program uses a database system to generate an analysis of demographics and participation to support necessary program modifications.
- Staff members are trained and responsible for maintaining a database system. They are able to produce reports and analyze results to enhance program services.
EVALUATION

Standard E.2 – Program collects and analyzes information related to program quality.

**E. 2.1 Minimum Quality Indicator**

Program utilizes the Standards of Quality for Family Strengthening & Support Program Self-Assessment Tool and other appropriate program assessment tools.

**E. 2.1 High Quality Indicator**

Program conducts an annual self-assessment utilizing the Standards of Quality for Family Strengthening & Support Program Self-Assessment Tool and other appropriate program assessment tools. Program analyzes results to inform program planning efforts, and makes appropriate modifications.

Some examples may include:

- Staff members at all levels are familiar with the process of implementing the Standards of Quality for Family Strengthening & Support Program Self-Assessment Tool.

- Program conducts team meetings to complete the Standards of Quality for Family Strengthening & Support Self-Assessment Tool and the Father-Friendliness Organizational Self-Assessment tool.

- Annual program review meeting involves staff members at all levels reflecting on results within the context of research-based practices.

- Program provides professional development for staff members to address service areas that have been identified to be improved or enhanced.
EVALUATION

Standard E.2 – Program collects and analyzes information related to program quality. (continued)

E. 2.2 Minimum Quality Indicator
Program invites and records feedback regarding program quality from families and other stakeholders, such as service provider partners.

Some examples may include:

- Program utilizes the Participant Survey of the Standards of Quality for Family & Strengthening & Support.

- Methods of collecting feedback from families, such as surveys, focus groups, and interviews are in place.

- Program solicits feedback from other service providers to gather feedback on its quality.

E. 2.2 High Quality Indicator
Program analyzes and shares feedback regarding program quality with families and other stakeholders, such as service provider partners. Appropriate program modifications are made as a result.

Some examples may include:

- Feedback regarding program quality is discussed with the Program’s Parent Advisory Committee, and their input is solicited to make suitable modifications.

- Feedback regarding program quality is compiled and reported in the Program’s newsletter, along with a plan to build on strengths and address concerns.
EVALUATION

Standard E.3 – Program collects and analyzes information related to program outcomes.

E. 3.1 Minimum Quality Indicator
Program tracks data on participant and program outcomes.

Some examples may include:
• Program records progress toward contract/grant deliverables.
• Program identifies and tracks participant progress that is relevant to its services and the needs of the community.
• Program administers pre- and post-tests for a parent education series.

E. 3.1 High Quality Indicator
Program tracks data on participant and program outcomes, and analyzes it in partnership with stakeholders. Information is compiled and used for program modification, accountability to stakeholders, and to inform policy change as needed.

Some examples may include:
• Program has been evaluated by an outside evaluator, and the Program shares out the summary or results.
• Program utilizes participant outcome data to continuously refine its activities, policies, staffing, and professional development.
• Outcome data regarding the success of a school readiness program is used to advocate for its expansion to serve more children.

- data analysis
- sharing evaluation results
- program modification
Standard E.4 – Program demonstrates that it incorporates evaluation as a core component of programming.

E. 4.1 Minimum Quality Indicator
Program has identified key questions to be answered through evaluation.

Some examples may include:

• Staff members and stakeholders have developed questions for the evaluation of a parent workshop series.

• Staff members ask the Parent Advisory Committee members what data they need in order to help plan future programming.

E. 4.1 High Quality Indicator
Program implements an evaluation plan based on key questions that measure progress toward program goals.

Some examples may include:

• Staff members have developed an evaluation plan, such as a logic model, to show how program goals, program activities, and participant outcomes are connected.

• Staff members and the Parent Advisory Committee work with a consultant to develop evaluation questions and an evaluation plan based on a theory of change.
Standard E.4 – Program demonstrates that it incorporates evaluation as a core component of programming. (continued)

E. 4.2 Minimum Quality Indicator
Staff members demonstrate a basic understanding of evaluation practices.

Some examples may include:

- Staff members understand evaluation terms and concepts, and how they are relevant to their work.
- Staff members know how to use data collection tools, such as intake forms and surveys.
- Staff members understand that focus groups can be used to get descriptive, informal feedback.

E. 4.2 High Quality Indicator
Program ensures that staff members receive training to support the integration of evaluation processes into its practices.

Some examples may include:

- Program provides training on evaluation to build skills and clarify the evaluation roles of staff members, board members, and Parent Advisory Committee members.
- Program ensures that staff members have the information and skills to access evaluation resources, such as websites, professional organizations, and relevant training.
Assessment: A formal process that includes non-judgmental evaluations of family capacities and goals.

Asset Mapping: The process of compiling an inventory of the human, material, financial, entrepreneurial, and other resources in a community. The Asset Mapping process identifies local organizations, businesses, and schools that have the potential to provide resources, such as services, funds, or in-kind gifts.

Capacity for Evaluation Integration: The ability and potential of the Program to receive, perform, and produce evaluation results as part of programming. This capacity includes internal resources, such as Program expertise, staff time for evaluation activities, financial resources, and leadership to sustain evaluation practices.

Developmental Assets: Abilities that human beings develop over time that enable them to thrive. These abilities may be cognitive, emotional, social, and physical development.

Direct Service Staff: Staff members of the Program who provide services for, or conduct activities with, program participants.

Enhanced Information and Referral: A service strategy that connects participants with resources, including following up with them to determine if they were able to access them and if their needs were met.

Evaluation Plan: A written document that states the objectives of an evaluation, the questions that will be answered, the information that will be collected to answer these questions, and when the collection of information will begin and end.

Family: People who are significant to one another, whether related by blood, legal bonds, or bonds of friendship and community. Ultimately, “family” is self-defined.

Family Structure: The composition and membership of the family, as well as the organization and patterns of relationships among individual family members.
**Family Support:** (1) An approach to strengthening families and communities so that they can foster the optimal development of children, youth, and adult family members. (2) A type of grassroots, community-based program designed to prevent family problems by strengthening parent-child relationships and supporting parents to be good nurturers and providers. (3) A shift in human services delivery that encourages public and private agencies to work in partnership with families to become more preventative, responsive, flexible, family-focused, strengths-based, holistic, and effective. (4) A movement for social change that urges policymakers, service providers, parents, and employers to take responsibility for improving the lives of children and families and for ensuring that they get what they need to succeed.

**Father-Friendliness Organizational Self-Assessment Tool:** A questionnaire for Programs to measure how welcoming they are of fathers developed by the National Center for Strategic Nonprofit Planning and Community Leadership in partnership with the National Head Start Association, the U.S. Department of Health and Human Services Administration for Children and Families, Region V, and the Illinois Department of Public Aid, Division of Child Support Enforcement.

**Formal Structure:** Design, policies, procedures, systemic integration, and intentional strategies with committed resources that ensure consistency of practice.

**Logic Model:** A planning tool that clarifies and graphically illustrates what a Program hopes to accomplish, what it does, and its intended impact. It includes the theory and assumptions that underlie the Program and communicates both short and long-term program outcomes.

**Navigating the Dynamics of Difference:** An approach to learning effective strategies to resolve conflicts, particularly among people whose cultural backgrounds and values differ. It encourages one to understand the effect that historic distrust has on present-day interactions, and to realize that one may misjudge others’ actions based on learned expectations. (Randall B. Lindsey, Kikanza Nuri Robins, and Raymond D. Terrell)

**Neighborhood Watch:** A nationwide model of organizing residents and businesses of a city block to work in partnership with local police to address public safety concerns and prevent crime.

**Outcomes:** The results of services and activities provided by the Program. Participant outcomes measure changes in an individual’s or family’s knowledge, behavior, attitudes, skills, or condition, as a result of participation. Program outcomes measure how well the Program is meeting its objectives and fulfilling its mission.

**Parent Advisory Committee:** A leadership group of Program participants that provides input, guidance, and feedback to the Program on a regular basis.

**Parent Cafés:** A series of structured parent-led small group conversations used with the Strengthening Families Approach that bring parents together to discuss issues important to them. The goal is to directly engage parents in building the Protective Factors needed to prevent the maltreatment of, and promote healthy outcomes for, their children.
**Peer Learning:** Learning about a topic of common interest with and from others as fellow learners.

**Policy Change:** A shift in thinking, principles, or action at the Program, local, state, or federal levels.

**Program:** An organization or an individual component of an organization that provides family strengthening and support services and activities. It may be public, private, or faith-based. It serves families, and may also serve individuals and communities.

**Program Self-Assessment:** An evaluation of the Program’s effectiveness in meeting its goals and objectives. Such an evaluation is conducted by the Program, and may include staff members, board members, parent leaders, and other stakeholders.

**Protective Factors:** Conditions or attributes in individuals, families, communities, or the larger society that, when present, mitigate or eliminate risk in families and communities, and increase the health and well-being of children and families.

**Resilience:** The ability to manage and bounce back from all types of challenges that emerge in every family's life.

**Stakeholders:** Internal or external parties, such as persons, groups, and organizations, which have a direct or indirect stake in the Program. They can affect, or be influenced by, the Program’s actions, objectives, and policies. Key stakeholders in a Family Strengthening and Support Program may include: staff members, board members, children, families, schools, collaborative partners, networks, government agencies, policy makers, funders, business owners, and the community.

**Strength-Based Approach:** A positive approach to working with families that recognizes that all people have strengths, and emphasizes the importance of helping them discover, develop, and utilize those strengths to solve problems and achieve goals.

**Strengthening Families Approach:** Developed by the Center for the Study of Social Policy in 2005, an approach that focuses on building 5 Protective Factors with families that research has shown increase family stability, enhance child development, and reduce child abuse and neglect. These Protective Factors are: Parental Resilience, Social Connections, Concrete Support in Times of Need, Knowledge of Parenting and Child Development, and Social and Emotional Competence of Children. For more information, please see www.cssp.org/reform/strengthening-families.

**WIC:** The Women, Infants & Children federally funded supplemental nutrition program for low-income families with young children. The program provides supplemental food items, nutrition education, and breast-feeding support, as well as referrals to health and social services, for eligible pregnant and new mothers of children aged 0-5 years.
Founded in 2011, the National Family Support Network (NFSN) is a membership-based organization of statewide networks that focus on strengthening and supporting families. Its mission is to connect these networks to promote quality practice, peer learning, mutual support, and effective policies and systems that support positive outcomes for children, families, and communities.

For more information, please see www.nationalfamilysupportnetwork.org
### Children's Board Family Resource Centers Utilization Report FY 2019 - Note: Temple Terrace was established in FY 2020

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</tr>
</thead>
<tbody>
<tr>
<td>Brandon</td>
<td>492</td>
<td>334</td>
<td>296</td>
<td>340</td>
<td>439</td>
<td>435</td>
<td>464</td>
<td>372</td>
<td>265</td>
<td>291</td>
<td>363</td>
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<td>219</td>
<td>185</td>
<td>143</td>
<td>134</td>
<td>211</td>
<td>233</td>
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<td>403</td>
<td>349</td>
<td>373</td>
<td>461</td>
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<td>342</td>
<td>363</td>
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<td>227</td>
<td>291</td>
<td>253</td>
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<td>539</td>
<td>510</td>
<td>632</td>
<td>520</td>
<td>492</td>
<td>457</td>
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<td>385</td>
<td>434</td>
<td>456</td>
<td>375</td>
<td>5778</td>
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<tr>
<td>TNC</td>
<td>419</td>
<td>372</td>
<td>300</td>
<td>440</td>
<td>434</td>
<td>552</td>
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<td>392</td>
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<td>2486</td>
<td>2022</td>
<td>1870</td>
<td>2345</td>
<td>2371</td>
<td>2431</td>
<td>2385</td>
<td>1931</td>
<td>1749</td>
<td>2065</td>
<td>2171</td>
<td>1911</td>
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</tr>
</thead>
<tbody>
<tr>
<td>Brandon</td>
<td>1323</td>
<td>527</td>
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<td>677</td>
<td>717</td>
<td>769</td>
<td>1112</td>
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<td>8714</td>
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<td>Central Tampa</td>
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<td>536</td>
<td>595</td>
<td>579</td>
<td>412</td>
<td>199</td>
<td>330</td>
<td>622</td>
<td>604</td>
<td>5824</td>
</tr>
<tr>
<td>East County</td>
<td>1145</td>
<td>978</td>
<td>828</td>
<td>1612</td>
<td>1003</td>
<td>934</td>
<td>1159</td>
<td>1072</td>
<td>813</td>
<td>1019</td>
<td>1120</td>
<td>1033</td>
<td>12716</td>
</tr>
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<td>North Tampa</td>
<td>996</td>
<td>452</td>
<td>343</td>
<td>710</td>
<td>753</td>
<td>818</td>
<td>1089</td>
<td>620</td>
<td>424</td>
<td>467</td>
<td>669</td>
<td>531</td>
<td>7872</td>
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<tr>
<td>South County</td>
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<td>773</td>
<td>804</td>
<td>667</td>
<td>587</td>
<td>588</td>
<td>657</td>
<td>604</td>
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<td>TNC</td>
<td>1283</td>
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<td>1188</td>
<td>850</td>
<td>944</td>
<td>820</td>
<td>992</td>
<td>811</td>
<td>11534</td>
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<td>Totals</td>
<td>6262</td>
<td>4145</td>
<td>3146</td>
<td>5816</td>
<td>4710</td>
<td>5011</td>
<td>5931</td>
<td>4442</td>
<td>3407</td>
<td>3682</td>
<td>4766</td>
<td>4283</td>
<td>55601</td>
</tr>
</tbody>
</table>
Children’s Board of Hillsborough County
PRO 2020 – 12 Intent to Negotiate (ITN)
Level (1) Investment Grant
Children’s Board Family Resource Centers (CBFRC)
Appendix (#5) – CBFRC Family Survey

1 Which Children’s Board Family Resource Center do you visit the most? (N=622)
2. Approximately how long have you been visiting the Children’s Board Family Resource Centers? (N = 617)

- Less than a month: 16%
- Less than one year: 22%
- 1-3 years: 30%
- 3-5 years: 17%
- 5 or more years: 16%

3. In what language do you prefer receiving services? (N = 619)

- English: 71%
- Spanish: 26%
- Other: 3%

4. Is the location of the Children’s Board Family Resource Center convenient for you? (N = 622)

- Yes: 94%
- No: 6%
### 5. How helpful has the Center Staff been with... (N=598)

<table>
<thead>
<tr>
<th>Question</th>
<th>Very Helpful %</th>
<th>Somewhat Helpful %</th>
<th>Not Very Helpful %</th>
<th>Not at all helpful %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talking with you about what you feel is important for your child and family?</td>
<td>85.1%</td>
<td>9.4%</td>
<td>1.8%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Asking you about your family's strengths, needs and interests?</td>
<td>75.9%</td>
<td>13.7%</td>
<td>3.8%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Respecting your culture and traditions?</td>
<td>86.1%</td>
<td>8.0%</td>
<td>0.8%</td>
<td>0.2%</td>
</tr>
<tr>
<td>Communicating with you in your language?</td>
<td>89.0%</td>
<td>5.4%</td>
<td>0.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Providing access to a range of services that are most helpful for your family?</td>
<td>85.6%</td>
<td>9.2%</td>
<td>2.0%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Providing you with services and/or referrals you need?</td>
<td>83.9%</td>
<td>9.7%</td>
<td>1.3%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Relieving stress for you and your family?</td>
<td>76.3%</td>
<td>12.0%</td>
<td>2.5%</td>
<td>2.2%</td>
</tr>
</tbody>
</table>
7. What days and times are the most convenient for you and your family to visit the Center?

<table>
<thead>
<tr>
<th>Day</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 AM</td>
<td>35.47%</td>
<td>37.06%</td>
<td>37.04%</td>
<td>36.62%</td>
<td>36.31%</td>
<td>34.32%</td>
<td>24.29%</td>
</tr>
<tr>
<td>11:00 AM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3:00 PM</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5:00 PM</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
</tbody>
</table>

6. The hours available for services at the Family Resource Centers are convenient for me (N = 614)

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>54.7%</td>
</tr>
<tr>
<td>Agree</td>
<td>42.2%</td>
</tr>
<tr>
<td>Disagree</td>
<td>3.6%</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

8. Did your child(ren) participate in any summer educational programs in 2019 at your Center?

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>78.9%</td>
</tr>
<tr>
<td>No</td>
<td>21.1%</td>
</tr>
</tbody>
</table>
## Appendix (#5) – CBFRC Family Survey

<table>
<thead>
<tr>
<th>Service/Support</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child Development Information</td>
<td>60.3%</td>
</tr>
<tr>
<td>CPR/First Aid Class</td>
<td>39.7%</td>
</tr>
<tr>
<td>Car Seat Safety Class</td>
<td>30.4%</td>
</tr>
<tr>
<td>Nutrition Class</td>
<td>28.7%</td>
</tr>
<tr>
<td>General Parenting Class</td>
<td>24.2%</td>
</tr>
<tr>
<td>Notary Services</td>
<td>21.0%</td>
</tr>
<tr>
<td>Mobile Mammography Clinic</td>
<td>19.7%</td>
</tr>
<tr>
<td>Food Pantry</td>
<td>19.3%</td>
</tr>
<tr>
<td>Health Workshop</td>
<td>18.7%</td>
</tr>
<tr>
<td>Public School Transitions (Kindergarten, Middle or High School)</td>
<td>18.5%</td>
</tr>
<tr>
<td>Income Tax Assistance</td>
<td>18.0%</td>
</tr>
<tr>
<td>Resumes Assistance</td>
<td>17.8%</td>
</tr>
<tr>
<td>Clothing Closet</td>
<td>17.7%</td>
</tr>
<tr>
<td>How to Have the Talk with your Teens</td>
<td>16.7%</td>
</tr>
<tr>
<td>Job Application Assistance</td>
<td>15.8%</td>
</tr>
<tr>
<td>Financial Literacy Class</td>
<td>15.3%</td>
</tr>
<tr>
<td>New/Expectant Parent Community Services</td>
<td>14.8%</td>
</tr>
<tr>
<td>Immigration Services</td>
<td>14.6%</td>
</tr>
<tr>
<td>Conversational English Class</td>
<td>14.4%</td>
</tr>
<tr>
<td>Citizenship Study Group</td>
<td>13.6%</td>
</tr>
<tr>
<td>Adult Education Assistance (obtaining GED)</td>
<td>11.2%</td>
</tr>
<tr>
<td>Roscope/Self Care Classes</td>
<td>10.8%</td>
</tr>
<tr>
<td>Understanding the Census</td>
<td>9.8%</td>
</tr>
<tr>
<td>Military Family Support Group</td>
<td>8.5%</td>
</tr>
<tr>
<td>Tell us other events that you would like offered at your center</td>
<td>5.0%</td>
</tr>
</tbody>
</table>

9. Check all the service/supports that you or another adult family member has used or would like to see available (N = 870)

10. Check all the services/supports your child has used or would like to see available (N = 554)
11. Check all services/supports Your Family has used or would like to see available (N = 538)

<table>
<thead>
<tr>
<th>Service/Support</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family Fun and Games</td>
<td>50.9%</td>
</tr>
<tr>
<td>Music Lessons</td>
<td>48.9%</td>
</tr>
<tr>
<td>Cooking class</td>
<td>48.3%</td>
</tr>
<tr>
<td>Art Lessons</td>
<td>44.8%</td>
</tr>
<tr>
<td>Free Play</td>
<td>44.1%</td>
</tr>
<tr>
<td>Holiday Celebrations</td>
<td>43.5%</td>
</tr>
<tr>
<td>Story time</td>
<td>41.8%</td>
</tr>
<tr>
<td>Mother/Mother figure events with their children</td>
<td>37.7%</td>
</tr>
<tr>
<td>Celebrating Diversity Events</td>
<td>37.4%</td>
</tr>
<tr>
<td>Movie Night</td>
<td>34.9%</td>
</tr>
<tr>
<td>Father/Father figure events with their children</td>
<td>33.1%</td>
</tr>
<tr>
<td>Family Community Advisory Council</td>
<td>20.3%</td>
</tr>
<tr>
<td>Events or programs for children with special needs</td>
<td>19.7%</td>
</tr>
<tr>
<td>Tell us other events that you would like offered at your Center</td>
<td>5.8%</td>
</tr>
</tbody>
</table>

12. What can the center do better?

Answered 282

13. Do you follow the Children's Board Family Resource Centers on Social Media (Facebook, Twitter, Instagram)? (N = 587)

<table>
<thead>
<tr>
<th>Follow on Social Media</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>29.3%</td>
</tr>
<tr>
<td>No</td>
<td>70.7%</td>
</tr>
</tbody>
</table>

14. Where do you hear/read about Family Resource Center activities? (N = 597)

<table>
<thead>
<tr>
<th>Source of Information</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family/Friend</td>
<td>43.4%</td>
</tr>
<tr>
<td>Other</td>
<td>21.6%</td>
</tr>
<tr>
<td>Website</td>
<td>21.3%</td>
</tr>
<tr>
<td>Newsletter</td>
<td>10.9%</td>
</tr>
<tr>
<td>Facebook, Twitter, Instagram</td>
<td>6.4%</td>
</tr>
</tbody>
</table>
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Daily Operations

Subject: Dress Code

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children's Board Family Resource Center's that staff maintain a professional appearance at all times.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Daily Operations

Subject: Dress Code

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

All Children’s Board Family Resource Center employees are required to wear the CBHC staff uniform during the normal course of business with khakis or black pants. Staff should wear CBFRC name tags at all times. With consideration given to individuals with allergies; fragrances should not be used.

Management may make exceptions for special events/occasions.

Not permitted:

- Spandex leggings
- Blue jeans
- Shorts
- Exercise pants
- Flip-flops
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Daily Operations

Subject: Hours of Operation

Effective Date: October 1, 2020       Revision Date:

Review Date:

It is the policy of the Children's Board Family Resource Centers to establish operational hours consistent with community needs, data driven documentation, and operational resources. In times of disaster or crisis the established hours of operation may be modified to meet the needs of the community.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Daily Operations

Subject: Hours of Operation

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Operational hours of the Children's Board Family Resource Centers will be determined by community needs, data driven and operational resources. In times of disaster or crisis the operational hours may be modified with direction from the Children's Board of Hillsborough County.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Daily Operations
Subject: Hours of Operation & Opening and Closing
Effective Date: October 1, 2020 Revision Date:
Review Date:

It is the policy of the Children’s Board Family Resource Centers to establish operational hours consistent with community needs, data driven documentation, and operational resources. In times of disaster or crisis the established hours of operation may be modified to meet the needs of the community.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Daily Operations

Subject: Hours of Operation & Opening and Closing Protocol

Effective Date: October 1, 2020  Revision Date:

Review Date:

Procedure:

Hours of operation must be posted in each Center ensuring universal access. A minimum of two staff members should be present during operating hours. Opening and closing procedures should be available to all employees, this should include:

- Checklist of opening and closing procedures;
- Sign-in and sign-out protocol;
- Alarm protocol;
- Attendance and Needs Tracking System (ANTS) protocol;
- Daily sanitization and cleaning procedures.

Hours of operation for non-holiday Family Resource Center Schedules will be as follows:

Monday  9-5
Tuesday  9-7
Wednesday  9-6
Thursday  9-7
Friday  9-6
Saturday  9-5

*The holiday schedule will follow that of the Children’s Board of Hillsborough County.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Daily Operations

Subject: First Aid

Effective Date: October 1, 2020         Revision Date:

Review Date:

The Children’s Board Family Resource Centers are committed to maintaining a safe environment for children, families, and staff. Staff will adhere to reasonable sanitary and safety standards and routines daily. Each Children’s Board Family Resource Center will maintain a stocked First Aid Kit and follow Universal Precautions in the event of an incident.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Daily Operations

Subject: First Aid

Effective Date: October 1, 2020  Revision Date:

Review Date:

Procedure:

Family Resource Center safety requirements include but are not limited to:

Each FRC must maintain a fully stocked First Aid Kit (the kit should not include oral medications). The First Aid Kit is available to treat minor abrasions; in more serious matters staff should call 911 for aid.

Staff will be trained in the following:

- First Aid Certification
- CPR for adults and children
- Universal Precautions
- Material Safety Data Sheets
- Hazardous Spills and Waste Disposal / Use of Personal Protective Equipment
- Stop the Bleed

Frist Aid Kit must be in a visible area and include:

- Sterile Gauze
- Tape
- Band Aids
- Alcohol Pads
- Cotton Balls
- Scissors
- Tweezers
- Antibiotic Ointment
- Hydrocortisone Cream

*Staff should contact the managing agency and the Children's Board in the event of any major safety issue or event.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Daily Operations

Subject: Code of Conduct

Effective Date: October 1, 2020  Revision Date:

Review Date:

The Children's Board Family Resource Centers strive to ensure Members, Staff and Volunteers can work and play in an environment free of threatening speech or actions, harassment, hostility, discrimination or unreasonable disruption.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Daily Operations

Subject: Code of Conduct

Effective Date: October 1, 2020       Revision Date:

Review Date:

Procedure:

Threatening behavior whether implicit or explicit, will not be tolerated. Members/volunteers exhibiting such behavior will be banned from any FRC, employees will be disciplined up to and including termination.

Offensive language, intimidation, aggressiveness, improper gestures or profanity will not be tolerated.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Established Membership

Effective Date: October 1, 2020  Revision Date:

Review Date:

It is the policy of the Children's Board Family Resource Centers to establish a no cost formal Membership for individuals to utilize the universal services of the Family Resource Centers. Membership may be denied for individuals classified as Offender/Predator for the safety of children and families.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Established Membership

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Applicant identification is required to establish Hillsborough County residency as well as to track accurate data on utilization of services and establish formal membership. Staff will establish an alert with the Hillsborough County Sheriff's Department to verify applicant is not on the Sexual/Predator registry.

If the individual is on the registry the Banned Member protocol should be followed; staff should ask the individual to leave the premises and then notify the Managing Agency and the Children's Board of Hillsborough County (Incident Report Form). The Managing Agency will then determine the risk of the individual being in contact with children and families associated with the Family Resource Center. If the individual is determined to be a threat to children and families a Certified Letter will be sent to the individual permanently banning him/her from all Family Resource Centers.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Banned Members

Effective Date: October 1, 2020    Revision Date:

Review Date:

Children’s Board Family Resource Centers have the right to expect each FRC to be a safe place to visit, attend programming, meetings, and volunteer. Anyone violating the Code of Conduct or deemed a threat to children will be banned from all Children’s Board Family Resource Center properties.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Banned Members

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Banned Member is defined as anyone who violates the Children’s Board Family Resource Center, Code of Conduct or whom commits one of the following offenses:

- Use of FRC equipment to intimidate, harass, or harm another individual;
- Use of FRC equipment to access, distribute, or encourage the use of pornographic or offensive materials;
- Accesses a FRC in an impaired state;
- Identified by Florida Law Enforcement as a sexual predator or offender;
- Commits any act considered to be harmful or offensive.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Children

Effective Date: October 1, 2020  
Revision Date:

Review Date:

The Children’s Board Family Resource Centers will adhere to “best practice standards” for the health and safety of children visiting the Centers.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Children

Effective Date: October 1, 2020       Revision Date:

Review Date:

Procedure:

Children’s Board Family Resource Center staff is responsible for ensuring activities for children are supervised and age appropriate. Center driven activities should support optimal child development, promote attachment, and contribute to being ready to enter kindergarten.

Children under the age of twelve (12) should be accompanied by an adult. Children twelve (12) and over must have parent/legal guardian consent to participate in activities. Centers should adhere to ratios and spacing for determining the maximum number of children participating in activities.

If a child requires special assistance it is the responsibility of the caregiver.

Sick Adults/Child(ren): Adults/children who display signs of illness should not participate in Center activities.

Sanitizing and Cleaning Play Areas and Toys: Staff should ensure all play areas are sanitized and safe daily.

- Play areas should be cleaned/sanitized daily
- Centers should cover electrical outlets, remove all cords and any sharp objects
- Broken toys should be discarded
- Centers should post parental disclaimers for support in cleaning play areas and child supervision.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Member Confidentiality

Effective Date: October 1, 2020 Revision Date:

Review Date:

The Children’s Board Family Resource Centers will not share personal information of Members with any other person, provider or organization outside of the Family Resource Center system without prior written permission of the Member or by Court Order.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Member Confidentiality

Effective Date: October 1, 2020 Revision Date: Review Date:

Procedure:

Personal information of Family Resource Members should be secured in a double locked file in a protected environment. A Release of Information form must be signed by a Center Member prior sharing information unless it is requested by Court Order.

Email documents should not include Member specific or HIPPA protected information. Email attachments with Member data should be encrypted. All information related to Members should be maintained in accordance with HIPPA guidelines.

Member photos:

A release must be obtained from a Member prior to using a photo in print or electronic communication.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Use of Center Equipment

Effective Date: October 1, 2020 Revision Date:

Review Date:

It is the policy of the Family Resource Centers to allow Members access and utilization of computers, fax machines and copy machine, when not in use for calendared programming.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Use of Center Equipment

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Center equipment (computers, copier, fax) may be utilized for personal reasons such as seeking employment, education, social services, communicating personal information for medical, insurance, purposes etc. This list is not all inclusive but Center equipment should not be used for retail or for-profit ventures and should be limited to a reasonable amount of time and copies.

Staff should monitor equipment usage and assist Members if needed. Each computer should be programmed to have all Members acknowledge “Computer Usage Guidelines” prior to login. Guidelines should also be posted in the Computer Lab in English and Spanish.

Software should not be downloaded without permission of the Center staff. The internet home screen should be the Children’s Board website.

There is no food allowed in the computer lab.

See “Banned Membership” policy for unacceptable use of equipment including any use that is pornographic, erotic, adult content, illegal or unethical.

Any deliberate damage to Center equipment is grounds for banning Membership.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Volunteers

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children's Board Family Resource Centers to utilize volunteers whom are Members in good standing. A Volunteer Application must be submitted, and a training must be completed prior to activation.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Volunteers

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Volunteers must be eighteen (18) years old and Members in good standing with the Family Resource Center; they must submit a Volunteer Application and be approved by the Center Manager. The following will then be required:

- Confidentiality Agreement;
- Release of Information;
- Level II Background (agency will cover the charge) – Information must be secured in a double locked area and must be maintained for five years.

Once accepted the volunteer must complete a training delivered by a Center staff member or designee and it must include at a minimum the following topics.

Training:

- Child Development 101
- Customer Service
- Dynamics of Domestic Violence
- Family and Child Dynamics
- Universal Precautions
- Inclusion
- Sexual Harassment
- Diversity
- HIPAA
- Emergency protocol
- CPR/First Aid
- Attendance and Needs Tracking System (ANTS)
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Attendance and Needs Tracking System (ANTS)

Effective Date: October 1, 2020    Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Center to support a data collection system that will collect, track, and maintain accurate Membership data.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Attendance and Needs Tracking System (ANTS)

Effective Date: October 1, 2020  Revision Date:

Review Date:

Procedure:

Membership data will be collected using the ANTS Card with a pre-printed numbered barcode. Staff scans and records services received by each Member by accessing the menus from ANTS screen.

ANTS Card Information forms must be used when establishing membership and when updating the Member’s personal information.

An ANTS usage guide must be maintained at each location and any disruption in service should be immediately reported to the Children’s Board of Hillsborough County IT staff.

The Center Manager at each location is responsible for ordering supplies.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Membership

Subject: Community Advisory Council

Effective Date: October 1, 2020 Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to establish a Community Advisory Council at each location to provide input on how the Center can optimize its value to the community.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Membership

Subject: Community Advisory Council

Effective Date: October 1, 2020       Revision Date:

Review Date:

Procedure:

A Community Advisory Council will be established at each Children’s Board Family Resource Center, acting in an advisory capacity to provide input on service needs and maximizing the Center’s value to the community.

The Council should be diverse in composition and membership must include the following the representation:

- Business Community;
- Faith Community;
- Community Leader (elected or appointed);
- School System (social work if possible);
- Early Learning Provider (in good standing with Child Care Licensing);
- Healthcare;
- Two Members at large.

The Community Advisory Council will be provided with an orientation from the Center Manager or designee and include at a minimum the following:

- Demographics of the community;
- Mission of the Family Resource Centers, services and locations;
- Overview of the Children’s Board and programming;
- Structure of the Council, guidelines and obligations;
- Attendance and Needs Tracking System (ANTS).

A Council Chair will be elected, and members will serve for two years. A staff member will be assigned to serve as administrative support to the Council. There will be an established agenda and minutes will be recorded.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Risk Management

Subject: Incident Reporting

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to capture all Incidents/complaints that may put Members and their children at risk. Critical incidents must be reported to the Children’s Board of Hillsborough County within 24-hours of the event.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Risk Management

Subject: Incident Reporting

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Assigned staff must complete the Complaint/Incident Report upon receipt of notification of a critical incident(s) affecting health, safety, welfare, unplanned law enforcement involvement, or consumer medical emergency and forward the report to the Managing Agency, the Children’s Board of Hillsborough County, Director of Programs and the Executive Director within one (1) business day.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Risk Management

Subject: Safety and Security

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to ensure, as reasonably possible, a safe environment and workplace for all Members, staff, and vendors while in the Family Resource Center.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Risk Management

Subject: Safety and Security

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

Children’s Board Family Resource Centers will conduct quarterly drills and educate/train staff on safety threats and the appropriate response. Emergency practice drills will be conducted covering the following areas:

- Fire;
- Tornado;
- Active Shooter;
- Shelter in Place.

Roll will be taken of staff in attendance as well as Members. The Center Safety Officer is responsible for recording and maintaining the documentation.

Staff must have approval from the Center Manager to enter the facility outside of regular operating hours. There should be two staff members present at all times. Staff understands there may be video surveillance of the facility 24-hours a day. Signs will be posted in common areas alerting the general public to any active video surveillance system.

It is against Center policy to interfere with the video surveillance system and staff will be formally disciplined up to and including termination for such act.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: Risk Management

Subject: Disaster/Crisis Response

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to recognize the staff and Center as an Essential Agency to the community during times of disaster, post-disaster and crisis events.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: Risk Management

Subject: Disaster/Crisis Response

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

The Family Resource Centers and staff are considered Essential Services and service providers during a disaster, post disaster or crisis event.

Each Center is unique and can provide an array of services to the community. Each Center will have a formal Disaster Plan which will include an implementation timeline and securing the facility and equipment. Failure to follow the Disaster Plan may result in the Managing Agency being responsible for any damage to the facility or contents.

The Family Resource Center System should have a Communication Plan in place to alert the staff and Membership of impending danger, the role of the FRC and what services may be available in a post disaster situation.

Decision to Close: Any decision to close/re-open a facility in whole or part will be determined by the Children's Board of Hillsborough County.

The Children's Board of Hillsborough County may re-locate staff to a Family Resource Center during an emergency/crisis.

The Children's Board Family Resource Center system will have a Disaster Response Plan which will outline their role in community response during a disaster/crisis.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: General Operations

Subject: Outreach

Effective Date: October 1, 2020       Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to operate in a manner that is responsive to the community they serve. Outreach is a vital exercise in maintaining that connection and communication that will maximize the effectiveness of services to children and families.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: General Operations

Subject: Outreach

Effective Date: October 1, 2020

Revision Date:

Review Date:

Procedure:

The Family Resource Center system has an obligation to maintain continuous contact with the community it serves. Communication with the community should include at a minimum; notification of services, surveying for needs, advocating for its Membership. This includes regular contact with the following:

- City Councils;
- Chambers of Commerce/business community;
- Neighborhood Associations;
- Civic groups;
- Faith Communities;
- Healthcare community;
- Schools;
- Law enforcement;
- Membership.

Contacts should be logged and submitted to the Children's Board on an agreed upon reporting cycle.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: General Operations

Subject: Programming

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to provide programming that is responsive to the needs of the community they serve.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: General Operations

Subject: Programming

Effective Date: October 1, 2020  Revision Date:

Review Date:

Procedure:

Children's Board Family Resource Centers will operate programs that are responsive to community needs. There are standard programs that address healthcare/developmental needs that are countywide and will be delivered at each Center.

Community Advisory Councils will be used for programmatic guidance and identifying service gaps. Surveys, focus groups, and data will guide specific programming that will be both culturally appropriate and family focused. All programming will be centered around family support to create parental support, social connections, while building on the social determinants of health.

The distribution of monthly calendars will notify the community of the service array; calendars will be available in English and Spanish.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: General Operations
Subject: Revenue Diversification

Effective Date: October 1, 2020  Revision Date:
Review Date:

It is the policy of the Children’s Board Family Resource Centers to allow for revenue to maximize and diversify through grants, donations and sponsorships.
CHILDREN'S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: General Operations

Subject: Revenue Diversification

Effective Date: October 1, 2020    Revision Date:

Review Date:

Procedure:

The Children's Board Family Resource Centers are allowed in whole or in part to make application for grants, seek donations, and solicit sponsorships for activities or community needs.

The Managing Agency must be notified of any outside revenue application or solicitation.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: General Operations

Subject: Use of Facility

Effective Date: October 1, 2020

Revision Date:

Review Date:

It is the policy of the Children’s Board Family Resource Centers to recognize the Family Resource Center System belongs to the citizens of Hillsborough County and is open for community partners to reserve for meeting and activity space.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: General Operations

Subject: Use of Facility

Effective Date: October 1, 2020 Revision Date:

Review Date:

Procedure:

Children’s Board Family Resource Centers are open to the community to promote community engagement activities at no charge. Community partners must reserve the space, sign a Usage Agreement and follow all regulations concerning hours of operation, food, audio visual equipment, custodial duties, alcoholic beverage rules and smoking policies.

The Children’s Board Family Resource Centers reserve the right to cancel a meeting or deny meeting space for just cause.

Staff will confirm reservations with community partners no later than 48-hours prior to the scheduled event.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Policy Category: General Operations

Subject: Staff/Volunteer Training

Effective Date: October 1, 2020

Review Date: Revision Date:

It is the policy of the Children’s Board Family Resource Centers to hire and train a well rounded and professional staff to support the strengths of children and families in the communities they serve.
CHILDREN’S BOARD FAMILY RESOURCE CENTERS

Employee Policies Manual

Procedure Category: General Operations

Subject: Staff/Volunteer Training

Effective Date: October 1, 2020  Revision Date:

Review Date:

Procedure:

In addition to the Managing Agency’s mandatory training for employees the Children's Board Family Resource Center’s require at a minimum training in the following areas:

- Customer Service;
- Child Development 101;
- Dynamics of Domestic Violence;
- Universal Precautions;
- Family and Child Dynamics;
- CPR/First Aid;
- Inclusion;
- Sexual Harassment;
- Diversity;
- HIPPA;
- Emergency Protocol;
- Attendance and Needs Tracking System (ANTS).
Children’s Board of Hillsborough County
PRO 2020-12 Intent to Negotiate (ITN)
Level (1) Investment Grant
Children’s Board Family Resource Centers (CBFRC)
Appendix (#7) – Overview of CBFRC Structure and Staff Positions

One Managing Agency for (7) Children’s Board Family Resource Centers

**Director (Full-Time):** Master’s in Social Work, Public Administration, Business Administration, or related field

Seeking an individual with demonstrated ability to lead a network of community based Centers that involves developing and maintaining relationships; a high level of accountability and proactive written/verbal communication skills; experience with meeting facilitation, hands on supervisory/coaching responsibilities, knowledge of facility management; and performing quality assurance functions to sustain or achieve high quality in model fidelity in accordance with family support standards and mission of the Children’s Board. The Director will be available to support all Centers during operating hours, perform outreach functions to include participation in Chamber of Commerce or Neighborhood Association meetings and shall keep an office at one of the Centers. In addition, the Director will possess technology skills that include knowledge of collecting, interpreting and reporting data.

Bilingual (English/Spanish) a plus.

**Center Manager (Full-Time):** Bachelor’s Degree in Social Work, Early Childhood or related field

Seeking an individual with demonstrated skills in developing programming to meet the unique needs of the community and Center members. The Manager has the capacity to apply knowledge in assessing situations, provide clear verbal/written communications, respond to incidents or crisis, and capacity to supervise/coach staff. This position is responsible for creating the staff schedule, reviewing the Center calendar and documenting critical incident reports. To diversity services, the manager will train or develop staff skills to implement programs or events at the Center. The Manager will recruit and facilitate an engaged Advisory Council to survey and guide both operations and services. The Manager possesses a strength-based approach to family support service delivery and uses resources wisely. In addition, contributes solutions with partners and funders to serve in accordance with Family Support Principles.

Bilingual (English/Spanish) preferred in both verbal and writing skills.
Early Childhood Service Coordinator (Full-Time): Bachelor’s Degree in related field

Seeking an individual with experience in primary responsibility to provide case management services for at least 30 open cases at any given time with families who have children ages birth to 6. The Coordinator will possess a strong knowledge base and establish relationships with community resources to successfully link families with the needs identified in their family support plan. This position is responsible for planning early childhood events at each Centers to engage families and refer to St. Joseph’s Hospital for developmental screenings. The Coordinator(s) will rotate working on Saturday and conduct home visits to meet the needs of the family and ensure successful enrollment in key services.

Bilingual (English/Spanish) preferred.

Service Coordinator Supervisor (Full-Time): Bachelor’s or Master’s degree

Seeking an individual with experience in case management and supervising a team providing family support and coordination services. The individual is knowledgeable of Hillsborough County child serving systems and community resources. The Supervisor shall be housed at one of the Centers. The supervisor has a strong work ethic, clear communication skills and knowledge of proper documentation/data integrity practices. Prior experience with use of Administrative Services Organization (ASO) funding is preferred.

Bilingual (English/Spanish) preferred in both verbal and writing skills.

Intake/Referral Specialist (Full-Time): Bachelor’s or Associate’s Degree in related field

Seeking an individual with high quality customer services skills and a positive attitude. The individual must possess the desire to hear each family story, commit to identifying a wide range of resources to navigate information and referrals for participants who call or walk-in to the Center. Services provided to families will be documented and follow up conducted as necessary.

Bilingual (English/Spanish) preferred

Support Specialist (Part and/or Full-Time): Associate’s or High School Diploma

Seeking an individual with experience in serving families. The position will coordinate and assist contracted service partners or organizations using the facility who serve Center members. The position will be knowledgeable in community resources to provide referrals or guidance to families with school age children and provide follow up as necessary. The position will coordinate and assist contracted service partners or organizations using the facility who serve Center members.
Family Specialist (Part and/or Full-Time): Associate’s or High School Diploma or (two-year) work or volunteer history in a related customer service field

Seeking an individual to assist with implementing strength-based family support programming and facilitate center-driven programming or events. The Family Specialist will provide Center orientation to new families. Provide direct assistance to families that require additional support in completing applications or referral consents.

Overall Team and Center Expectations

All team members are expected to:

- understand the value and foundation of the Protective Factors framework;
- practice Family Support Principles;
- cross trained to perform daily operating procedures;
- participate in Center events and work to support contractual outcomes;
- be trained in the Center data system: Attendance and Needs Tracking System and maintain member confidentiality;
- bilingual employees may be needed to review and/or translate (verbal or written communications); and
- attend mandatory trainings and perform other duties as assigned.

Each Center is expected to:

- designate (1) staff who can provide Notary Services;
- be a safe, warm, welcoming environment;
- abide by policies and procedures as updated; and
- maintain cooperative internal and external working relationships.
GENERAL TERMS AND CONDITIONS

STANDARD CONTRACT COST REIMBURSEMENT CONTRACTS

1. Services and Findings: The PROVIDER will provide for the residents of Hillsborough County the services described in Attachment 1, Scope of Service, Service and Performance Objectives (hereafter "Services"). The CHILDREN'S BOARD finds it to be in the public interest to provide children's services through the PROVIDER for the residents of Hillsborough County who are in need of such services. Pursuant to Section 125.901, Florida Statutes, as it existed prior to October 1, 1990, the CHILDREN'S BOARD finds it has authority to allocate and provide funds to PROVIDER. The CHILDREN'S BOARD finds that the best interest of the public will be served by entering into an agreement with the PROVIDER.

   If a Matrix / Work Plan has been approved by the CHILDREN’S BOARD for this Agreement, the Matrix / Work Plan will describe the program’s design, task management, evaluation design, and data collection. The Matrix / Work Plan for this Agreement, if any, shall state Agency’s name and the Program’s name as described on Attachment 1, Scope of Service, Service and Performance Objectives; (1.1.) Result Area(s) and (2.) Outcomes. The Matrix / Work Plan will serve as a current work plan for the Services. Parts of the Matrix / Work Plan may be modified only as described in paragraph 5 (f.)

2. Service Area: PROVIDER will maintain service sites which are accessible and convenient to the clients. PROVIDER will advise the CHILDREN'S BOARD in writing prior to any change in the location of service sites designated in paragraph (3.) Service Area, on the Agreement Cover Sheet.

   If a Matrix / Work Plan has been approved for this Agreement, and if the Matrix / Work Plan describes the location of service sites, the location of service sites may be modified only as described in paragraph 5 (f.)

   A PROVIDER or a Sub-contractor of a PROVIDER serving in designated zip codes or neighborhoods through a “Place Based Initiative” may serve residents of Hillsborough County residing outside of those designated areas only when providing Outside-Area Emergency Services, which are Services reasonably necessary to help avoid a potentially serious risk to a person’s health, safety, or welfare; or to help alleviate the effects of an event or incident that seriously affected a person’s health, safety, or welfare. An Outside-Area Emergency Service is a Critical Incident that must be reported to the CHILDREN’S BOARD pursuant to paragraph 5.g.vi.

3. Term: PROVIDER will perform the Services during the period designated in paragraph (6.), Term, on the Agreement Cover Sheet. This Agreement will terminate at midnight on the last date designated in paragraph (6.), Term, on the Agreement Cover Sheet unless extended for an additional period by the CHILDREN'S BOARD by written notice to the PROVIDER prior to termination. If the CHILDREN'S BOARD elects to extend this Agreement, in each extension the CHILDREN'S BOARD may increase or decrease the amount of the contract award or extend the term, at no additional amount.
4. Payment: To receive payment, PROVIDER must perform the Services to the reasonable satisfaction of the CHILDREN'S BOARD, and provide proof of the same.

To receive payment, the PROVIDER must complete certify and submit to the CHILDREN'S BOARD:

a. The CHILDREN'S BOARD Reimbursement Request Forms, as appropriate, which, if received by 5:00 p.m. on Friday, the payment will be released on the following Friday.

b. Other reports and information requested by the CHILDREN'S BOARD, including those reports listed in Attachment 1, Scope of Service, Service and Performance Objectives, (2.) and (3.). The CHILDREN'S BOARD will reimburse the PROVIDER for services provided and expenditures incurred and paid. Reimbursement will be made according to the line item budget described in Attachment (2), Budget. The CHILDREN'S BOARD will not reimburse the PROVIDER for any expenditures in excess of the amount budgeted by line without prior approval or notification as described in paragraph 5 (d.) and (e.)

5. Modifications and Required Notifications:

a. General Requirements: Except for modifications made in accordance with the requirements of this paragraph 5 and that do not materially modify the Services, this Agreement may only be amended or modified in writing. The PROVIDER may not rely on any verbal directive of any employee or agent of the CHILDREN'S BOARD which amends or modifies any part of this Agreement. No course of conduct by employees or agents of the CHILDREN'S BOARD will act as a waiver of any part of this Agreement and the CHILDREN'S BOARD will not be prevented from raising as a defense that the provisions of this Agreement have been amended or modified by verbal directions or by the acts or omissions by employees or agents of the CHILDREN'S BOARD.

b. Modifications Requiring Prior Approval by the CHILDREN'S BOARD: The PROVIDER must obtain the prior written approval of the CHILDREN'S BOARD to:

i. Change the number or assignments of staff providing the Services or the percent of time individual staff members spend performing the Services or administering the program funded by this Agreement. Staff resignations must be reported to the CHILDREN'S BOARD as soon as the agency has received notice of the resignation. If a Matrix / Work Plan has been approved for this Agreement, and if the Matrix / Work Plan describes the staffing information in this sub-paragraph, such information may be modified only as described in paragraph 5 (f.)

ii. Expend funds in a manner or an amount that is inconsistent with the Budget, or increase or decrease the Budget by an amount in excess of the amounts described below in the sub-paragraph (e.i.) entitled Budget Modifications Requiring Notification.

c. Modifications and Performance or Contract-related Events Requiring Notification: Subject to the other provisions of this paragraph and the rights of the CHILDREN'S BOARD under this Agreement, including, but not limited to, its rights under paragraph 15, Performance, the PROVIDER will notify the CHILDREN'S BOARD in writing as soon as reasonably possible either before or after any of the following occurs:
(1) the PROVIDER changes the service site;
(2) Services are not initiated on the date of commencement described in this Agreement, or the PROVIDER knows that the Services will not begin or continue on the date specified herein, whichever occurs first;
(3) the work of an assignee or sub-contractor ceases or materially changes;
(4) if the CHILDREN'S BOARD has authorized the PROVIDER to assign or sub-contract a portion of the Services, the PROVIDER will furnish a copy of the assignment or sub-contract to the CHILDREN'S BOARD;
(5) funds from other sources which were budgeted to provide the Services are not available in the amounts or at the times planned;
(6) the PROVIDER obtains funds to provide the Services in addition to those which were budgeted or the PROVIDER becomes aware of additional funds from other sources that are available to provide the Services;
(7) the PROVIDER does not provide the scope or level of Services planned;
(8) employees working in the program are terminated, reassigned, or resign;
(9) the program is or may be adversely affected by any other situation or event including any media coverage, public inquiry, or regulatory inquiry, citation, or action against PROVIDER that may impact PROVIDER or services;
(10) fixed assets are: (i) moved to a location other than the location or locations described in this Agreement; or (ii) used to provide services, functions or in activities not described in this Agreement; or (iii) used in a program not described in this Agreement; or (iv) lost, stolen, or in a condition that prevents their use as described in this Agreement;
(11) cancellation or revision to the PROVIDER’S insurance applicable to the performance of the Services;
(12) a written complaint by any person receiving Services funded in whole or in part by this Agreement, except that written notification to the CHILDREN’S BOARD must be given within (5) days after PROVIDER’S receipt of the complaint;
(13) the PROVIDER’S governing Board or Executive Director changes. If the PROVIDER has a website, the PROVIDER agrees to list their governing Board and Executive Director on their website; and
(14) any change to information listed on Attachment (5): Addresses change.

Although the foregoing Modifications or Events do not require the prior approval of the CHILDREN'S BOARD, if the CHILDREN'S BOARD is notified by the PROVIDER or if the CHILDREN'S BOARD determines through inspection, review, or other means that any of the Modifications or Events has occurred or is about to occur, and the CHILDREN'S BOARD determines in its sole discretion that such Modifications or Events jeopardize the successful performance of the Services, the safety of clients or their families, or others; or the proper use of funds received from the CHILDREN'S BOARD, then the CHILDREN'S BOARD may exercise any of the remedies set forth in paragraph 15-16.

Proposed modifications other than those permitted in this paragraph (5) may be required by the CHILDREN'S BOARD in accordance with the Policies of the CHILDREN'S BOARD.

d. Budget Modifications Requiring Prior Approval - General Conditions: The PROVIDER may request to make budget modifications during the fiscal year in accordance with this Agreement and the CHILDREN'S BOARD’S procedures and forms. The PROVIDER must obtain the prior written approval of
the CHILDREN’S BOARD to change the budget in excess of the limits described in subsection e. Budget Modifications Requiring Notification below. A request for modification must be received by the CHILDREN’S BOARD at least ninety (90) days prior to the end of the Agreement.

   e. Budget Modifications Requiring Notification: Subject to paragraph ii below, PROVIDER is authorized to adjust the budget as follows without the prior approval of the CHILDREN’S BOARD:

      i. Subtotal line items may be increased or decreased up to $500 or 10%, whichever is greater.
      ii. No single subtotal line item may be increased or decreased more than once each year without prior written CHILDREN’S BOARD approval.

   f. Matrix / Work Plan Modifications: If a Matrix / Work Plan has been approved for this Agreement, the Matrix / Work Plan may be modified only as follows:

      i. The representatives of the CHILDREN’S BOARD and PROVIDER authorized to modify the Matrix / Work Plan are called the Matrix Representatives. Each party will designate its Matrix Representative by written notice to the other party upon execution of this Agreement. Either party may change its Matrix Representative upon written notice to the other party.

      ii. By written agreement of the Matrix Representatives, Columns 1-3 and 5-7 relating to Process Objectives, Activities, Responsible Parties, Indicator Measurements, Data Source, and Time of Measurements in the Matrix / Work Plan may be modified based upon a more current analysis of the appropriate methods to perform the Services or to resolve problems in the administration of the Matrix / Work Plan.

      iii. It is the intent of the parties that the Matrix / Work Plan will be construed to be consistent with these General Terms and Conditions and the Budget, but the event of a conflict, the provisions of these General Terms and Conditions and the Budget shall take precedence, as applicable.

   g. Notifications of Critical Incidents Affecting Health, Safety, Welfare, Unplanned Law Enforcement or Media Involvement: As soon as possible, but no later than one business day of PROVIDER knowing of a Critical Incident, PROVIDER shall notify the CHILDREN’S BOARD by telephone and in writing and provide the CHILDREN’S BOARD with a description of the incident and such other information as the CHILDREN’S BOARD may reasonably request in writing pursuant to Paragraph 8. A Critical Incident means any of the following incidents involving PROVIDER’S Participants or any Participant of a sub-contractor of PROVIDER. A Participant means any person receiving any Service funded in whole or in part by this Agreement. A Critical Incident also includes any of the following incidents that include a specific reference to an Employee or volunteer. Employee means a PROVIDER officer or employee or volunteer, or an officer or employee or volunteer of a PROVIDER sub-contractor under this Agreement, collectively called an Employee or volunteer, as applicable, below. Nothing in this section shall be construed to imply that employees of PROVIDER’S sub-contractors are employees of PROVIDER or that clients and Participants of PROVIDER’S sub-contractors are clients or Participants of PROVIDER. All e-mail communications made or received by the CHILDREN’S BOARD are subject to the Florida Public Records Law, Chapter 119, Florida Statutes. Nothing in this paragraph relieves PROVIDER from directly reporting any matter to state, federal, or non-CHILDREN’S BOARD local agencies or law enforcement agencies when such reporting is required by law, including reporting to the
A CRITICAL INCIDENT is any:

i. Abduction – An incident in which an individual who does not have care and custody of a Participant has wrongfully taken the Participant.

ii. Abuse or Neglect – Reasonable cause to suspect that a Participant has been harmed or is believed to be threatened with harm from a person responsible for the care of the Participant. Arrest also includes the arrest of any PROVIDER officer for any reason.

iii. Arrest – PROVIDER Employee, PROVIDER volunteer, or PROVIDER’s sub-contractor’s volunteer’s arrest for conduct or activity related to work for PROVIDER under this Agreement; death or harm to a Participant; or for a potentially disqualifying offense under level (2) background screening requirements as defined in Chapter. 435, Florida Statutes.

iv. Death of Participant – The death of any Participant if the death may be related to or is alleged to have been related to Participant’s involvement in a PROVIDER program funded in whole or in part by this Agreement.

v. Illness of Participant – An illness of a Participant determined by a licensed health care professional to be life-threatening or the result of apparent abuse or neglect if PROVIDER has reason to believe that the illness or abuse or neglect may be related to or is alleged to have been related to Participant’s involvement in a PROVIDER program funded in whole or in part by this Agreement.

vi. Service Outside Designated Areas – PROVIDER or PROVIDER’S sub-contractor’s Services funded in whole or in part by this Agreement are provided to a person residing outside of the PROVIDER’S service areas designated by this Agreement.

vii. Sexual Battery – An allegation of sexual battery involving a Participant or Employee or volunteer as evidenced by medical evidence or law enforcement involvement. Sexual battery includes Participant on Participant incidents, Employee on Participant, and Participant on Employee.

viii. Suicide or Suicide Attempt – The suicide of a Participant or an act that reflects the physical attempt by a Participant to cause his or her own death, which results in bodily injury requiring medical treatment by a health care professional.

ix. Unplanned Law Enforcement Involvement

x. Unplanned Media event which the CHILDREN’S BOARD may be reasonably expected to provide a response.

xi. Other Serious Incidents – Any action, incident, misconduct, or malfeasance involving PROVIDER’S staff, volunteers or participants that could potentially jeopardize the performance of this Agreement.
6. **Reimbursement Forms:** One reimbursement form must be submitted each month for each CHILDREN’S BOARD-funded program. The final reimbursement form must be submitted to the CHILDREN’S BOARD within forty-five (45) days of the termination of this Agreement.

7. **Incorporation of Agreement Documents:** The Agreement between the CHILDREN’S BOARD and the PROVIDER consists of the following contract documents:

   (a) The page entitled "Standard Agreement Cover Sheet";
   
   (b) The page entitled "Agreement";
   
   (c) Attachment (1) entitled "Scope of Service, Service and Performance Objectives";
   
   (d) Attachment (2) entitled "Budget";
   
   (e) Attachment (3) consisting of these "General Terms and Conditions";
   
   (f) Attachment (4) entitled "Assignments and Sub-contractors";
   
   (g) Attachment (4a) entitled “Roles and Responsibilities of Lead Agencies and Sub-Contracted Agencies” (if applicable); and
   
   (h) Attachment (5) entitled "Addresses."

8. **Program Monitoring:** The PROVIDER will submit progress reports and other information in such formats and at such times as may be prescribed by the CHILDREN’S BOARD, cooperate in site visits and other on-site monitoring (including, but not limited to: access to sites, clients, staff, fiscal and client records and logs, and the provision of related information), submit reports on any monitoring of the program funded in whole or in part by the CHILDREN’S BOARD conducted by federal, state, or local governmental agencies or other funders; and if the PROVIDER receives accreditation reviews, each accreditation review must be submitted to the CHILDREN’S BOARD within thirty (30) days after receipt by PROVIDER. All of the foregoing in this paragraph is referred to, collectively, as Program Monitoring in this paragraph. The PROVIDER agrees to such Program Monitoring to the extent it is not prohibited by law and does not involve disclosure to the CHILDREN’S BOARD of information which is confidential pursuant to law, statutory, judicial or otherwise, including, but not limited to, Chapters (39) and (415), Florida Statutes. All reports will be as detailed as may be reasonably requested by the CHILDREN’S BOARD and will be deemed incomplete if not satisfactory to the CHILDREN’S BOARD, as determined in its sole discretion. All reports will contain the information, additional information, or be in the format as may be requested by the CHILDREN’S BOARD. The extent and scope of the Program Monitoring has been determined as a planning rather than an operational level decision of the CHILDREN’S BOARD and the CHILDREN’S BOARD will incur no liability regarding the extent or scope of Program Monitoring provided. If approved by the CHILDREN’S BOARD, the CHILDREN’S BOARD will accept any report from another monitoring agency in lieu of reports customarily required by the CHILDREN’S BOARD.
9. **Records**: The PROVIDER will maintain financial and accounting records (including electronic storage media), all original invoices and other documentation supporting the Reimbursement Request Forms submitted to the CHILDREN'S BOARD, and records to substantiate the eligibility of participants. The PROVIDER shall conduct transactions in accordance with generally accepted accounting principles and Florida Statutes. The PROVIDER will maintain such records and accounts, including programmatic, property, personnel, and financial records, as are deemed necessary by the CHILDREN'S BOARD to assure a proper accounting for all CHILDREN'S BOARD'S funds. The PROVIDER will maintain a separate record of revenues and expenses applicable to this Agreement for the purposes of review thereof. The PROVIDER will make, or cause to be made, available to the CHILDREN'S BOARD and its duly authorized representatives, for copying and examination, all such records with respect to any matters covered by this Agreement, and the PROVIDER will permit same to be copied and examined; excerpts or transcriptions to be made from such records; and reviews to be made of all agreements, invoices, materials, records of personnel and employment, and other data related to all matters covered by this Agreement. The Auditor General, Comptroller General and other agencies, whether local, state or federal will have the right to inspect and review the records of the PROVIDER. This paragraph will survive termination of this Agreement, including any termination under paragraph 16, Termination, and the PROVIDER will retain for examination, copying, and review all of its records and supporting documentation applicable to this Agreement for five (5) years after receipt of final payment from the CHILDREN'S BOARD. If a review has been initiated and findings have not been resolved at the end of five (5) years, the records will be retained and this paragraph will survive until resolution of the review findings.

10. **Insurance - Public Liability, Bodily Injury, and Property Damage**: The PROVIDER will procure, pay for, and maintain, throughout the period of this Agreement, on behalf of PROVIDER and the CHILDREN'S BOARD, the following insurance coverages with responsible insurance companies eligible to do business in the State of Florida, acceptable to the CHILDREN'S BOARD:

   a. Commercial General Liability for the premises and operations of the PROVIDER, including Personal Injury and Contractual for this Agreement, with the CHILDREN'S BOARD included as an additional insured for the operations of the PROVIDER, with limits for Bodily Injury, Property Damage and Personal Injury of not less than:

   - Each Occurrence: $1,000,000
   - Personal Injury: $1,000,000
   - General Aggregate: $1,000,000
   - Products & Completed Operations: $1,000,000
   - Damage to Rented Premises: $50,000

   If PROVIDER rents premises for performance of the Services

   b. (1) Automobile Liability Insurance for PROVIDERS that own vehicles that may be used in carrying out this Agreement: Automobile Liability Insurance for the PROVIDER’s operation, maintenance and use of owned, non-owned, hired and leased automobiles, with the CHILDREN'S BOARD included as an additional insured, with a limit of not less than:
Bodily Injury & Property Damage Liability $500,000 Each Accident for entities with less than $1,000,000 in assets $1,000,000 Each Accident for entities with $1,000,000 or greater in assets

(2) Automobile Liability Insurance for PROVIDERS that do not own vehicles used in carrying out this Agreement: Hired and Non-Owned Automobile Liability coverage with the CHILDREN’S BOARD included as an additional insured, with a limit of not less than:

Bodily Injury & Property Damage Liability $500,000 Each Accident for entities with less than $1,000,000 in assets $1,000,000 Each Accident for entities with $1,000,000 or greater in assets

The PROVIDER will submit to the CHILDREN’S BOARD a certificate of insurance within thirty (30) days of receiving an executed contract which describes the insurance maintained by the PROVIDER and PROVIDER’S employees who transport Participants. The PROVIDER will provide written notice to the CHILDREN’S BOARD within fifteen (15) days of any cancellation or revision to the PROVIDER’S insurance applicable to the performance of the Services.

If PROVIDER certifies that any portion of the insurance requirements cannot be obtained or cannot be obtained at a commercially reasonable cost to the funded program and provides such other information as requested by the CHILDREN’S BOARD in writing, the CHILDREN’S BOARD may replace any portion of the insurance requirements with such other requirements and program restrictions as determined by the CHILDREN’S BOARD, in its sole discretion.

11. Insurance and Right to Recover Fixed Assets: If this Agreement provides CHILDREN’S BOARD funds for the purchase of fixed assets which have a value of $5,000 or more and a normal expected life of one (1) year or more, the PROVIDER will maintain insurance against destruction, loss or theft of the full insurable value of such fixed assets.

By at least thirty (30) days' written notice to the PROVIDER, the CHILDREN'S BOARD may exercise its right to recover such fixed assets, except when the CHILDREN'S BOARD declares a potential or actual contract breach. If a potential or actual contract breach is declared in writing, then such equipment may be ordered returned immediately along with such accountings, production of records, and reports as the CHILDREN’S BOARD may direct in writing.

If this Agreement is for a program funded by the CHILDREN'S BOARD and another agency pursuant to a joint funding arrangement or agreement, the CHILDREN'S BOARD has a right to fixed assets purchased with such joint funds. The CHILDREN'S BOARD'S interest in the fixed assets will be in the same ratio as the CHILDREN'S BOARD'S funding used to purchase the fixed assets is to the property's total purchase price. However, no such ownership or interest will exist in any vehicle unless the CHILDREN'S BOARD, by separate written notice, advises the PROVIDER of the CHILDREN'S BOARD'S intent to exercise the right granted by this Agreement. Unless so notified in writing by the CHILDREN'S BOARD, title to all vehicles will be vested exclusively in PROVIDER'S name.
If this Agreement funds improvements to property designated as Reimbursable Improvements in this Agreement, unless PROVIDER obtains the prior written approval of the CHILDREN'S BOARD, the PROVIDER must repay the funds received from the CHILDREN'S BOARD for such Reimbursable Improvements according to the following schedule:

<table>
<thead>
<tr>
<th>Time</th>
<th>Amount of Reimbursable Improvement Funds to be returned:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior to the end of this Agreement</td>
<td>100%</td>
</tr>
<tr>
<td>After the end of this Agreement but prior to 1 year after the termination of this Agreement</td>
<td>80%</td>
</tr>
<tr>
<td>1 year or more after the end of this Agreement but prior to 2 years after the termination of this Agreement</td>
<td>70%</td>
</tr>
<tr>
<td>2 years or more after the end of this Agreement but prior to 3 years after the termination of this Agreement</td>
<td>50%</td>
</tr>
<tr>
<td>3 years or more after the end of this Agreement but prior to 4 years after the termination of this Agreement</td>
<td>40%</td>
</tr>
<tr>
<td>4 years or more after the end of this Agreement but prior to 5 years after the termination of this Agreement</td>
<td>25%</td>
</tr>
<tr>
<td>5 years or more after the termination of this Agreement</td>
<td>0%</td>
</tr>
</tbody>
</table>

As used in this Agreement, PROVIDER'S use stops when PROVIDER no longer uses the Reimbursable Improvement for the purposes described in the proposal. PROVIDER'S occupancy stops when PROVIDER no longer occupies and uses the portion of the property on which the Reimbursable Improvements were made.

Survival of paragraph: This paragraph and all the CHILDREN'S BOARD'S remedies permitted in this Agreement will survive the termination of this Agreement, including any termination under paragraph 16.

12. **Indemnification:** The PROVIDER will indemnify and hold harmless the CHILDREN'S BOARD, its agents, and employees from and against any and all liabilities, claims, judgments, or actions including court costs and attorney's fees that may hereafter at any time be made or brought by anyone on account of any personal injury, property damage, loss of monies, civil rights violation, or discrimination allegedly caused or occurring in whole or in part by any breach of contract; negligent, wrongful or intentional act or omission; or based on any acts of fraud or defalcation of the PROVIDER, its agents, employees, or sub-contractors, during performance under this Agreement.
In no event will the PROVIDER be liable for or have any obligation to defend the CHILDREN'S BOARD against such liability, claims, judgments, or actions, including costs and attorney's fees, arising out of the sole negligent acts of the CHILDREN'S BOARD.

13. **Insurance, Indemnification, Auditing, and Related Provisions for Governmental Entities:**

The following terms apply only to a PROVIDER who is a governmental agency, political subdivision, city, special district or other governmental body: (1) the PROVIDER may comply with the insurance requirements in this Agreement by submitting to the CHILDREN'S BOARD, upon request, written verification of liability protection in accordance with Section 768.28, Florida Statutes, or a written description of the manner by which property is protected against loss or destruction; (2) the CHILDREN'S BOARD will not be entitled to recover fixed assets if PROVIDER is prohibited by law from allowing the contractual recovery of fixed assets; (3) the PROVIDER'S indemnification will only be required to the extent such indemnification is within the legal authority of the PROVIDER, and nothing in this Agreement shall require the PROVIDER to indemnify or insure the CHILDREN'S BOARD for the CHILDREN'S BOARD'S negligence or to assume any liability for the CHILDREN'S BOARD'S negligence; (4) the CHILDREN'S BOARD may not require an audit except for the program activities funded by the CHILDREN'S BOARD; (5) the PROVIDER will be notified in writing by the CHILDREN'S BOARD of any default, noncompliance or violation of this Agreement, and the PROVIDER will have fifteen (15) days to correct the default, noncompliance or violation; (6) the PROVIDER may assert in an action or proceeding to enforce this Agreement that it lacks the legal authority to agree to paragraph 30, Costs of Litigation, but PROVIDER remains subject to paragraph 31 if it is determined in such action or proceeding (including any appeal) that PROVIDER does have the legal authority to contractually agree to the terms of paragraph 30; (7) the requirements of paragraph 18, Conflict of Interest, apply only to the program funded under this Agreement; and (8) paragraph 24, Title to Patents, Trademarks, Copyrights, and Other Materials does not apply to a PROVIDER who is part of the state university system or an agency thereof (a UNIVERSITY PROVIDER). The copyright, patent, or trademark on or for Intellectual Property defined in paragraph 24 which is developed by a UNIVERSITY PROVIDER will be owned by the UNIVERSITY PROVIDER. Such Intellectual Property will be first subject to any policy, contract, or rule of the UNIVERSITY PROVIDER which is generally applicable to its employees and which governs ownership and income from Intellectual Property (the Intellectual Property Policy). Subject to the share for an employee of the UNIVERSITY PROVIDER described in an agreement made pursuant to the Intellectual Property Policy by the UNIVERSITY PROVIDER with an employee of the UNIVERSITY PROVIDER regarding the division of income from the Intellectual Property, the CHILDREN'S BOARD will receive fifty percent (50%) of the UNIVERSITY PROVIDER'S share of the income from the Intellectual Property. The amount payable to the CHILDREN'S BOARD will not exceed the total amount paid by the CHILDREN'S BOARD to the UNIVERSITY PROVIDER under this Agreement. Payment will be made within forty-five (45) days after receipt by the UNIVERSITY PROVIDER.

Nothing in this Agreement is intended to be, or will be, deemed to be a waiver of either party's sovereign immunity. This paragraph will take precedence over any conflicting terms of this Agreement.

14. **Auditing Cost Reimbursement Contracts and Return of Funds:**

   a. **General:** During the term of this Agreement, funds described in the attached budget will be used by PROVIDER solely for providing the Services described in Attachment 1. Misspent funds are funds received by the PROVIDER from the CHILDREN'S BOARD which are not spent in accordance with
the attached budget or the terms of this Agreement. Misspent funds are subject to refund or set off to the CHILDREN’S BOARD, or other resolution as determined in the sole discretion of the CHILDREN’S BOARD. The CHILDREN'S BOARD is not required to conduct an audit prior to finding that the PROVIDER has misspent funds.

Any other expenditures in the program funded by the CHILDREN'S BOARD which are determined by the CHILDREN'S BOARD not to be in accordance with the attached budget will constitute a breach of this Agreement.

The PROVIDER will return to the CHILDREN'S BOARD any overpayment due to unearned funds. Unearned funds means funds paid to PROVIDER by the CHILDREN'S BOARD which are not due PROVIDER under the attached budget or the terms of this Agreement.

In addition to any other remedy, the CHILDREN'S BOARD may offset any unearned or misspent funds against any other funds due PROVIDER for previous or subsequent agreements. Repayments will be made by PROVIDER in accordance with CHILDREN'S BOARD instructions.

b. Required Audits: For any PROVIDER fiscal year ending during the term of this Agreement and for any fiscal year during which revenues or expenditures are recognized by the PROVIDER for the program covered by this AGREEMENT, the PROVIDER will submit to the CHILDREN'S BOARD (within one hundred eighty (180) days after the close of its fiscal year) year-end Financial Statements of the PROVIDER audited by a Certified Public Accountant (CPA) and any related management letters, any related communications or reports on internal control and any related reports on compliance with laws, rules and regulations. In the event that the PROVIDER is unable to comply with the 180-day requirement, a request for an extension of time must be submitted to the CHILDREN’S BOARD prior to the end of the 180-day period. Failure to furnish an audit shall be a basis for denial and/or refund to the CHILDREN’S BOARD of project funds by the PROVIDER. Failure to submit an audit disqualifies the PROVIDER from seeking future funding until the issue is resolved to the sole satisfaction and discretion of the CHILDREN’S BOARD. The audit shall separately identify for the program funded by this Agreement, the revenues by funding source, expenditures, and any refunds or transfers; and present this information either in the body of the Financial Statements, in the footnotes to the Financial Statements, or in a supplementary schedule. The auditor's report must include an opinion on all of the basic financial statements of the PROVIDER. The audit shall be conducted in accordance with auditing standards generally accepted in the United States of America as promulgated by the Auditing Standards Board of the American Institute of Certified Public Accountants (AICPA).

c. Payment for Required Audits: The cost of required audits may be paid for with funds from the CHILDREN'S BOARD as an administrative cost as included in the overhead/indirect cost expenditure in the attached Budget.

d. Compliance Audit Performed by a CPA Firm Retained by the CHILDREN’S BOARD: In addition to the required financial audit, the CHILDREN'S BOARD may select and retain a CPA firm to conduct a compliance audit or other accounting review of the program funded under this Agreement. The purpose of this audit will be to determine whether PROVIDER has complied with this Agreement. The audit may include: (1) a financial audit, which means an examination of financial statements in order to...
express an opinion on the fairness with which they present financial position, results of operations, and changes in financial position in conformity with generally accepted accounting principles; an examination to determine whether operations are properly conducted in accordance with this Agreement and with legal and regulatory requirements; an examination of expenditures made by the PROVIDER with funds received from the CHILDREN’S BOARD to determine compliance with Florida Statutes and this Agreement; a report on internal accounting control; and other tests of accountability as deemed necessary; and (2) a management letter, which means a statement of the auditor's comments and recommendations.

e. Payment for Compliance Audit Performed by a CPA Firm Retained by the CHILDREN’S BOARD: The CHILDREN’S BOARD will pay for the audit performed by a CPA firm retained by the CHILDREN’S BOARD, but the PROVIDER will reimburse the CHILDREN’S BOARD for the cost of the audit if a significant amount of disallowed costs are disclosed by the audit. The PROVIDER will reimburse the CHILDREN’S BOARD within sixty (60) days of the written notice from the CHILDREN’S BOARD. The CHILDREN’S BOARD may withhold funds due under this Agreement as a means to recover the cost of the audit and any misspent funds. The CHILDREN’S BOARD will determine in its sole discretion whether amounts of misspent or unearned funds are significant.

f. Survival of Paragraph: This paragraph will survive the termination of this Agreement, including any termination under paragraph (16), and will be binding for a period of five (5) years after receipt of final payment from the CHILDREN’S BOARD. If an audit has been initiated and findings have not been resolved at the end of five (5) years, this paragraph will be binding until resolution of the audit findings.

g. Audits or Reviews of Newly Funded or Small PROVIDERS: If a PROVIDER is newly funded by the CHILDREN’S BOARD or is a PROVIDER with a current fiscal year budget of less than $300,000, Board Policy 1B.1.02.1.13, Audit Requirements, will be applicable as determined by the CHILDREN’S BOARD.

15. Performance: In the event of default, noncompliance, or violation of this Agreement or unsatisfactory performance by the PROVIDER, its sub-contractors, agents, consultants or suppliers, as determined by the CHILDREN’S BOARD in its sole discretion, the CHILDREN’S BOARD may negotiate any acceptable remedy, provide additional training and assistance or, in its sole discretion and without any prior negotiation, impose in writing such sanctions as deemed appropriate. Such sanctions may include, but will not be limited to, withholding of payments, termination, or suspension of this Agreement in whole or in part. In such event, the CHILDREN’S BOARD will notify the PROVIDER fourteen (14) calendar days in advance of the effective date of such sanction, except where the CHILDREN’S BOARD determines that such sanction, withholding of funds, termination, or suspension should become effective at an earlier or later date, in which event such sanction, withholding of funds, termination, or suspension will be effective as provided in the notice. The PROVIDER will be reimbursed for those Services satisfactorily performed prior to the effective date of such sanction. In determining the amount to pay for such Services, the CHILDREN’S BOARD may increase or decrease the budget to describe the cost of providing the Services to the date of such sanction, withholding of funds, termination, or suspension, and then pay PROVIDER based on the revised budget.

16. Termination: This Agreement may be terminated at will by either party by giving seven (7) days’ prior written notice to the other and specifying the effective date thereof.
In addition, this Agreement may be terminated by the CHILDREN'S BOARD for any breach by PROVIDER upon twenty-four (24) hours' written notice. The CHILDREN'S BOARD, in writing and in its sole discretion, may waive any breach by the PROVIDER, but such waiver will not constitute a waiver of any further breaches, including breaches of the same type.

This paragraph will not limit the CHILDREN'S BOARD'S other remedies under this Agreement.

If funds to be paid PROVIDER under this Agreement become unavailable, the CHILDREN'S BOARD may terminate this Agreement upon no less than twenty-four (24) hours' written notice to the PROVIDER. The CHILDREN'S BOARD will determine the availability of funds.

Any termination notice will be delivered by certified mail, return receipt requested; or in person to the offices of the other party with proof of such delivery.

In the event of termination, the PROVIDER will be reimbursed according to the budgeted rates and terms of this Agreement for those Services satisfactorily performed prior to the effective date of termination as determined in the sole discretion of the CHILDREN'S BOARD. The term "budgeted rates" in this paragraph means those allocations and amounts contained in the attached Budget or the most recent amended Budget approved in writing by the CHILDREN'S BOARD. However, in the event of termination, the CHILDREN’S BOARD may increase or decrease the budget to describe the cost of providing the Services to the date of termination and then pay PROVIDER based on the revised budget. All rights and remedies of the CHILDREN'S BOARD and the PROVIDER to enforce this Agreement will survive termination of this Agreement.

17. Employment of Staff: The PROVIDER, at its expense, will employ staff to perform the Services. Such individuals will not be considered employees of the CHILDREN'S BOARD and are subject to the supervision, personnel practices, and policies of the PROVIDER. Unless otherwise approved in writing by the CHILDREN'S BOARD, all staff must meet qualifications stated in the application and any approved modifications. PROVIDER will have a policy and related procedure regarding background screening of paid and unpaid (volunteer) staff. PROVIDER must submit a payment invoice as proof of the most recent level two background screening for all personnel who have contributed their time to a CBHC funded program, including volunteers or contracted personnel providing direct service to clients and any employee whose pay has been funded, wholly or in part, by CBHC. The CHILDREN’S BOARD values diversity and endorses PROVIDER organizations to reflect the Hillsborough County population.

18. Conflict of Interest: The PROVIDER represents that it presently has no conflicting interest, financial or otherwise, in the performance of this Agreement and will acquire no interest, either directly or indirectly, which would conflict in any manner with the performance of the Services. The PROVIDER will not retain any individual or company with whom the PROVIDER or any individual member thereof has a conflict of interest.

19. Non-Discrimination: The PROVIDER represents to the CHILDREN'S BOARD that the PROVIDER is in compliance with all applicable federal, state, and local civil rights laws and laws that protect persons with disabilities. PROVIDER will not, on the basis of race, color, national origin, religion, sex, age, disability, sexual identity, or marital status, or any other basis prohibited by law, discriminate in any form or manner against PROVIDER'S clients, applicants for Services, or employees or applicants for employment. This Agreement is conditioned on the veracity of this paragraph. Within ten (10) days of
20. **Drug-Free Workplace:** PROVIDER will comply with the Drug-free Workplace Act, Section 440.101, Florida Statutes, and following sections.

21. **Other Financial Support:** The CHILDREN'S BOARD'S funds may not be used for expenditures for which funding is available from other sources. The PROVIDER may not use funds received from the CHILDREN'S BOARD to supplant funds previously or subsequently received from another source. The CHILDREN'S BOARD encourages use of its funds as financial match for securing funds from other sources. However, in such instances, the PROVIDER must obtain prior written approval from the CHILDREN'S BOARD. Revenues (including, but not limited to, subsidized child care funds or Medicaid) generated by the program supported by this Agreement but not included in the Budget (called Unbudgeted Program Income) shall be reported to the CHILDREN'S BOARD quarterly in the PROVIDER Contract Report. The CHILDREN’S BOARD may reduce funds paid to PROVIDER up to the amount of Unbudgeted Program Income.

All PROVIDERS must demonstrate efforts related to financial sustainability through funding diversification, including, but not limited to, fund development (such as donations, special events, endowment, fund raising campaigns); applying for support through grants and contracts from government agencies or corporate and/or private foundations; imposing fees for services; business planning and development of social enterprises; or other funding opportunities. The CHILDREN’S BOARD will require that PROVIDER develop and submit a sustainability or strategic action plan to CHILDREN’S BOARD for review by end of contract or with submission of annual audit (whichever comes first). and update the same annually, which shall outline the organizational goals, including monitoring timelines for agency personnel and/or the Board of Directors.

22. **PROVIDER Representations:** The PROVIDER represents that it is and will be during the term of this Agreement a corporation, a not-for-profit corporation, or a governmental agency operating in Hillsborough County.

23. **Confidential Information:** Unless required by the Florida Records Law, the PROVIDER will not disclose any information in writing to the CHILDREN'S BOARD which specifically identifies a client for any purpose not required by federal, state, or local laws and related regulations, except by written consent of the client, or his/her responsible parent or guardian where authorized by law.

24. **Title to Patents, Trademarks, Copyrights, and Other Materials:** If activities supported by this Agreement produce original writings, sound recordings, pictorials, reproductions, drawings or other graphic representations, and works of any similar nature (together called Intellectual Property), the CHILDREN'S BOARD may use, duplicate, and disclose such Intellectual Property, in whole or in part, in any manner, for any purpose whatsoever, and have others acting on behalf of the CHILDREN'S BOARD do so; except, however, that to the extent that such Intellectual Property is confidential pursuant to law, statutory, judicial or otherwise, including, but not limited to, Chapters (39) and (415), Florida Statutes, said Intellectual Property will not be viewed, duplicated, disclosed, or used in any manner whatsoever by the CHILDREN'S
Board. Title to Intellectual Property will vest in Provider, but no copyright, trademark, or patent on or for Intellectual Property will be obtained in the name of the Provider without the prior written approval of the Children's Board. If the Provider does not obtain title to the Intellectual Property, the Children's Board may obtain in its name and may own all copyrights, trademarks, or patents on or for Intellectual Property. No person, firm or corporation, including Provider, may use copyrighted or patented Intellectual Property or trademark without the prior written consent of the Children's Board. Intellectual Property will not be used for personal gain of the Provider or its employees, sub-contractors, agents, or others.

25. Publicizing of Children's Board Support: The Provider agrees to acknowledge Children's Board support on any agency and program materials, either electronic or print, and to utilize every reasonable opportunity to publicize the support received from the Children's Board, including publishing the Children's Board logo on the Provider website home page, establishing a link to the Children's Board website on the Provider website, and displaying the Children's Board logo in Provider service locations and administrative offices.

Provider agrees to acknowledge the Children's Board in all program materials by publishing the Children's Board logo with a statement such as “funding for services generously provided by the Children's Board of Hillsborough County”. Provider agrees to request that media also acknowledge the financial support received from the Children's Board (e.g., radio, television, online publications, or newspaper.)

Provider agrees to provide information about the Children's Board each year to its employees and governing Board of Directors at regularly scheduled meetings as verified in official Board Minutes. Provider agrees to notify the Children's Board of all outreach activities in advance of the event.

26. Participation in 2-1-1 Human Services Data Base: If not already a Participant, the Provider agrees to participate in the 2-1-1 human services data base by listing its agency and program information and profile with www.211atyourfingertips.org. During this Agreement’s term, the Provider agrees to keep such information current in the on line data base.

27. Assignments and Sub-contractors: The Provider may not assign the responsibility of this Agreement to another party or sub-contract any of the work contemplated under this Agreement, unless so specified in the Attachment entitled "Assignments and Sub-contractors," or unless the Provider obtains the prior written approval of the Children's Board. No such approval will obligate the Children's Board for more than the total dollar amount stated in this Agreement. All such assignments and sub-contracts will be subject to the conditions of this Agreement and to any conditions the Children's Board deems necessary.

Attached hereto is Attachment (4) "Assignments and Sub-contractors," a listing of all sub-contracts between Provider and any entity providing any part of the services required under this Agreement to include the Children's Board amount and the total sub-contract amount. All such sub-contracts must include a budget, and a description of contract deliverables in a form acceptable to the Children's Board. Sub-contracts must be approved as part of original Agreement by the Children's Board, and Provider must submit a signed copy of all sub-contractor agreement(s) within thirty (30) days of
execution of the Agreement with the CHILDREN’S BOARD. Also included with contracts having Assignments and Sub-contracts is Attachment (4a) Roles and Responsibilities of Lead Agencies and Sub-Contracted Agencies.

28. Coordination of Services and Values: PROVIDER agrees to work with the CHILDREN’S BOARD, other agencies, families, funders, and community stakeholders to promote, implement and practice the philosophy and values of the CHILDREN’S BOARD; to enhance coordination across agencies and systems; to maximize resources, reduce duplication, promote continuity, fill service gaps; and to constantly improve service delivery.

29. Continuity of Operations and Emergency Management Services: PROVIDER will submit an Emergency Management Services plan with the executed contract regarding continuity of operations to ensure that PROVIDER’s property and services are able to respond and recover from any natural and/or man-made disaster. The plan should include mission essential functions, delegations of authority and orders of succession, emergency communications among board, staff and volunteers (e.g., telephone calling tree, intranet, or other method/means), vital records and databases, personnel issues and coordination, funding continuity of programs, facility preparation, alternate facilities, training and testing, plan maintenance, role of agency in time of disaster, inventory of neighborhood resources, meeting the needs of people served.

In the event of a local, state, or federal government declaration of a state of emergency pursuant to Chapter 252, Florida Statutes, or similar authorization, for all or part of Hillsborough County, the PROVIDER and the CHILDREN’S BOARD may agree in an Emergency Services Work Plan that all or part of the unperformed Services under this Agreement shall be suspended and/or that all or part of the unperformed Services shall be revised, modified, reorganized, or changed into services to carry out Emergency Management as defined in Chapter 252, Florida Statutes, or similar law, (called “Emergency Management Services” in this Agreement). Such Emergency Management Services shall be performed at the Disaster Recovery Center or other locations designated by the CHILDREN’S BOARD or other coordinating agency described below. The Emergency Services Work Plan may provide that all or part of the unpaid payments by the CHILDREN’S BOARD under this Agreement shall be used to pay PROVIDER for such Emergency Management Services. A Typical Payment Plan for an Emergency Services Work Plan shall be for the CHILDREN’S BOARD to pay the unpaid portion of this Agreement in equal monthly installments during the remaining Term of this Agreement. The Emergency Management Services may be performed separately or in coordination with or under the direction of other government agencies and or community organizations such as United Way of Tampa Bay, Inc. The PROVIDER must have an Emergency Services Work Plan and shall assist in Emergency Management Services to the best of its ability. The PROVIDER will submit to the CHILDREN’S BOARD a PROVIDER Disaster Verification Form within thirty (30) days of receiving an executed contract which attests that an Emergency Services Work Plan is in place and up to date.

The CHILDREN’S BOARD may continue to pay the PROVIDER for up to six (6) months after a declaration of emergency in order to assist the PROVIDER in recovering its financial and institutional capacity that may have been diminished in performing Emergency Management Services.

The Emergency Services Work Plan and any amendment may be in writing or by oral agreement recorded in any form of audio recording.
PROVIDER shall incorporate this Continuity of Operations and Emergency Management Services clause in all sub-contracts so that PROVIDER’s sub-contractors have the same obligations toward PROVIDER as PROVIDER assumes toward the CHILDREN’S BOARD.

30. **Costs of Litigation:** The prevailing party in any litigation, administrative, or other proceeding arising out of the enforcement or interpretation of this Agreement will be entitled to recover from the other party the following fees, costs, and expenses: (1) Attorney’s fees in or prior to mediation, trial court, appellate court, bankruptcy court or before any administrative body; (2) all court, mediation, and bankruptcy costs; (3) travel costs charged by the attorney, any consultant, or expert witness while working on the dispute or claim including travel costs for investigation, review, or analysis; or in preparing reports; or in preparing opinions, reviewing documents, contracts, or accounting records; or in preparing for or attending depositions, conferences, meetings, court, or mediation; (4) court reporter fees and litigation costs; (5) attorney, consultant or expert witness fees for all time spent in investigation, review, or analysis; or in preparing audits; or in preparing opinions, reviewing documents, contracts, or accounting records; or in research; or in preparing for or attending depositions, conferences, meetings, court, or mediation; (6) certified public accountant fees for all time spent working on the matter, including, but not limited to, time spent in investigation, review, or analysis; or on preparing audits; or in preparing opinions, reviewing documents, contracts, or accounting records; or in preparing for or attending depositions, conferences, meetings, court, or mediation; and (7) all costs charged by the attorney, any consultant, or expert witness for services or copying, postage, long distance telephone calls, or preparing exhibits and all costs and expenses incurred by the prevailing party in conducting or defending the suit, action, or proceeding, including any costs that are taxable pursuant to any applicable statute, rule, or guideline (including, but not limited to, the Statewide Uniform Guidelines for Taxation of Costs in Civil Actions), as well as costs not taxable thereunder and including all attorney’s fees and costs and court costs even if not recoverable by law including, without limitation, all fees, taxes, costs, and expenses incident to appellate, bankruptcy, reasonableness of the amount of attorney’s fees and costs and post-judgment proceedings. The prevailing party shall be that party which shall have prevailed on a majority, but not necessarily all, of the material issues which were adjudicated in such proceeding.

Nothing in this paragraph will be construed as requiring arbitration.

31. **Public Entity Crimes:** Per Section 287.133, Florida Statutes, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

32. **No Third-Party Beneficiaries:** No third party will have any right to enforce this Agreement. This Agreement is intended for the sole benefit of the CHILDREN’S BOARD and the PROVIDER.
33. **Governing Laws:** This Agreement will be governed by the applicable laws, rules, and regulations of the State of Florida (without application of its conflict of laws provision) or the applicable laws, rules, and regulations of the United States when providing Services funded by the United States government.

34. **Integration:** This Agreement contains the entire agreement between the parties. There are no other oral agreements which are inconsistent with the terms and conditions of this Agreement.

IN WITNESS WHEREOF, the PROVIDER and the CHILDREN'S BOARD have executed this Agreement by their authorized officials.

WITNESS: 

Name of Provider

By: ____________________________
Signature

By: ____________________________
Signature of Authorized Official

(Printed Name) ____________________________
(Printed Name of Authorized Official)

(Title) ____________________________
(Title)

(Date) ____________________________

WITNESS: 

CHILDREN'S BOARD OF HILLSBOROUGH COUNTY, FLORIDA

By: ____________________________
Signature

By: ____________________________
Executive Director

(Printed Name) ____________________________

(Date) ____________________________

(Title) ____________________________
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Purpose

This handbook provides an overview of the fiscal reporting requirements and serves as a reference guide when contracting with the Children’s Board of Hillsborough County (CBHC). This handbook does not supersede contract requirements in the General Terms and Conditions (GTC).

Role of the Fiscal Representative and Contract Manager

The assigned Fiscal Representative and Contract Manager are responsible for assisting Providers and documenting contract compliance of Direct, Lead, and Sub-Contract Provider Agencies. The Contract Manager is the primary contact regarding questions or changes to the contract.

Audited Financial Statements Requirements

Provider agencies must submit audited financial statements to the Children’s Board within 180 days after the close of the provider agency’s fiscal year.

If your agency is unable to meet this requirement, contact your assigned Fiscal Representative at least forty five (45) days prior to the due date to request an extension. All extension requests must be presented to the CBHC Board Executive Committee for approval in order to continue payments after the due date.

If your agency is unable to regularly meet this annual requirement due to circumstances beyond the agency’s control (because it does not receive the required information necessary until after the due date), please contact your Contract Manager to request a special condition in your contract extending the due date at the time of contract negotiation.

Lead Agencies with Sub-contractor(s) - The Lead Agency must first approve an extension request prior to submitting the request to the Children’s Board Fiscal Representative. If the sub-contracted agency is unable to regularly meet this annual requirement due to circumstances beyond their control, please include a special condition in the subcontract agreement extending the due date and notify the Contract Manager of the extension.

The full sections of the CBHC Board Policy and General Terms and Conditions regarding this issue are included below.

The audit submission requirements originate from the CBHC Board Policy:

Policies Pertaining to General Agency Operations

1.13 Audit Requirements

A. The Agreement between the Children’s Board and Funded Agencies. The Agreement between the Children’s Board and funded agencies states that for any funded agency’s fiscal year ending during the term of the Agreement and for any fiscal year during which revenues or expenditures are recognized by the provider for the program covered by the Agreement, the provider will submit to the Children’s Board (within 180 days after the
close of the provider’s fiscal year) year-end audited financial statements and any related management letters, any related communications or reports on internal control, and any related reports on compliance with laws and regulations.

B. A Review of the Provider Agency’s Financial Statements. A review of the provider agency’s financial statements is acceptable for provider agencies with a current fiscal year budget of less than $300,000.

C. Newly Funded Agencies without Audits or Reviews. For provider agencies who have not previously received Children’s Board funding and who do not have audited or reviewed financial statements, the Children’s Board staff may conduct a review of such provider agency’s fiscal capacity during the first quarter of the contract period. The Children’s Board staff will require that the provider agency put in place a written audit preparation process that includes at least the following items:

1. Preparation of monthly financial statements
2. General ledger (reconciled)
3. Source documents (checks, reconciled bank statements)

The written audit preparation process shall be subject to review and written approval by the Children’s Board staff.

D. An Audit or Review. An audit or review (depending on the total agency budget amount for such newly funded agencies) must be completed by the end of the contract period.

E. Failure to Submit Audits or Reviews. The approval of the Executive Committee of the Children’s Board shall be required to continue payments under the Agreement to any provider who has not furnished the Children’s Board with an acceptable audit or review report within 180 days after the close of the provider’s fiscal year or before the end of the contract period in the case of newly funded agencies who lack prior audits or reviews as described in “Newly Funded Agencies Without Audits or Reviews” above.

The Board Policy requirements are included in the Contract General Terms and Conditions:

15. b. Required Audits: For any PROVIDER fiscal year ending during the term of this Agreement and for any fiscal year during which revenues or expenditures are recognized by the PROVIDER for the program covered by this AGREEMENT, the PROVIDER will submit to the CHILDREN’S BOARD (within 180-days after the close of its fiscal year) year-end Financial Statements of the PROVIDER audited by a Certified Public Accountant (CPA) and any related management letters, any related communications or reports on internal control and any related reports on compliance with laws and regulations. In the event that the PROVIDER is unable to comply with the 180 day requirement, a request for an extension of time must be submitted to the CHILDREN’S BOARD prior to the end of the 180-day period. Failure to furnish an audit shall be a basis for denial and/or refund to the CHILDREN’S BOARD of project funds by the PROVIDER. The audit shall separately identify for the program funded by this Agreement, the revenues by funding source, expenditures, and any refunds or transfers; and present this information either in the body of the Financial Statements, in the footnotes to the Financial Statements, or in a supplementary schedule. The auditor’s report must include an opinion on all of the basic financial statements of the PROVIDER. The audit shall be conducted in accordance with
generally accepted auditing standards as promulgated by the Auditing Standards Board of the American Institute of Certified Public Accountants (AICPA).

**Program Budget**

The program budget provides a summary of the cost for the delivery of services included in the contract. It may also include other revenue sources supporting the program. Each budget item must include a narrative describing the total program expense(s) and how the amount is calculated. All costs included in the budget should be necessary based on the program model contributing to the outcomes or deliverables listed in the contract. Instructions for the development of the budget are included in Appendix A. The budget forms provided are not to be altered.

*Lead Agencies with Sub-contractor(s)* - The lead agency is responsible for reviewing the subcontractor(s) budgets prior to submitting the budgets to CBHC.

**NOTE: Any documents submitted on out-of-date forms will be rejected.**

**CBHC Budget Review and Approval Process**

Once a budget (and a matrix) has been submitted to CBHC the following steps are taken:

- Review by the Fiscal Representative for completeness; if complete,
- Team review by Fiscal Representative, Contract Manager, Director of Finance, and Director of Programs. Feedback is given to Provider Agency.
- The Provider resubmits, an updated budget is reviewed by Fiscal Representative; if complete,
- Director of Finance reviews feedback and updated budget; if accurate,
- Budget is attached to a draft contract packet. Contract is reviewed by Director of Programs; if complete,
- Contract is reviewed by Executive Director; if approved,
- Contract is sent to Provider Agency for review and signature.

**Post Contract Execution**

Once the contract has been executed, a set of documents to include the reimbursement request form, budget modification form, budget to actual form and the fiscal reporting requirements handbook will be sent to the fiscal contact listed on the Attachment 5 at the provider agency.

**Reimbursement Request**

Reimbursement requests must be submitted using the form provided by CBHC each fiscal year.

Please note:

- Do not change the forms. Cells may be expanded or use wrap text for more space.
- Forms are fiscal-year specific; thus, forms from previous years will be rejected.
- Instructions for completing a reimbursement request are included in the Excel file in the Cost Reimbursement Instructions tab.
• Changes to the amounts in the Total Approved CBHC Budget column are not permitted unless a budget modification request has been approved. In these cases, the Fiscal Representative will send a revised reimbursement request reflecting the updated amounts.

A reimbursement request must be submitted for each month in which the program has expenditures to be charged to CBHC. Do not include expenses from different calendar months on a single reimbursement request. Reimbursements may be submitted more than once per month with prior CBHC approval. Final reimbursement requests are due forty five (45) days after the end of the contract period.

Reimbursement requests may be emailed to the CBHC Fiscal Representative. If a PDF request is emailed, also include the Excel version.

CBHC pays on a cost reimbursement model, which means that expenses must be paid prior to requesting reimbursement from CBHC, including purchases using a credit card. The credit card bill must be paid prior to including the expense on the reimbursement request. Use the date paid and total amount paid on the credit card bill on the reimbursement back up form.

Expenses included on the reimbursement request must reflect services performed or items purchased and received during the contract period, including salaries. We recommend that reimbursement requests for the first and last months of the contract period are double checked to be sure that expenses are included in the correct contract period. All items included on a reimbursement request must have been included in the budget or have received prior CBHC approval.

**Back Up:**
Complete all fields on the forms for each item requested. This includes the vendor being paid, check date, check or voucher number, total check amount, amount charged to CBHC, and a description of the items. When completing the description field, include the month of service for reoccurring items; for example, include the conference name, date, and who attended the conference for all costs associated with the conference; list examples of what was purchased in other line items. If a debit card was used, indicate this on the form and include an identifying number in order to refer back to the transaction if this item is requested during a site visit. List all check numbers, dates and amounts for payroll items if there is more than one pay date.

**New Requirement:** Beginning with and accompanying your agency’s (including subcontractors) first reimbursement request, please submit proof of the most recent background screening for all personnel who will contribute their time to a CBHC-funded program for fiscal year (FY) 2020, including volunteers, contracted personnel who will provide direct service to clients and any employee whose pay will be funded, wholly or in part, by CBHC. An invoice containing information such as the employee’s/volunteer’s/contractor’s name, type of screening performed, and date of screening would be sufficient to constitute “proof.” PLEASE NOTE: DO NOT send CBHC documentation containing the results of the background screening or any other confidential information.
Once your agency has complied with this requirement beginning with the first reimbursement request, this same type of documentation will be required on a monthly basis for any new employee/volunteer/contractor added to the grant, as well as any re-screening(s) conducted during the grant period.

**Allocations:**
In most cases, expenses should be charged to the contract using the actual cost directly related to each program. If expenses such as occupancy allocation and insurance are allocated to the program, a copy of the backup used to allocate the expense to the program showing the detail of what actual expenses were allocated for the month and the percent allocated to the program may be requested.

**Timing of Payments:**
CBHC processes payments weekly. If the reimbursement request has been submitted by close of business Friday, with all information completed correctly, payment will be made the following Friday. If all required information is not provided on a reimbursement request, the Provider’s fiscal contact will be required to correct the forms for re-submission. Payment will be held until the corrected information is re-submitted.

**Administrative/Indirect Expense:**
Administrative/indirect cost billed to date may not exceed 10% of total direct expenditures (adjusted for Lead agencies with sub-contractors) invoiced to date. See Appendix (A): Continuation Budget Instructions - Contractual Services section for a detailed explanation of the maximum amount of administration/indirect paid when subcontractors are included in the budget.

**Reimbursement for Conference Travel:**
If the conference is out of the Tampa Bay area, CBHC will pay for transportation to and from the airport and hotel. Meal expenses are reimbursed by using the federal rate (see www.gsa.gov for Meal Expenses Breakdown). The actual cost for meals is not reimbursed. If a meal is provided at the conference, CBHC does not reimburse for that per diem meal.

**Non Allowable Expenses:**
CBHC does not reimburse for: sales tax paid if purchases are made in Florida, salary and benefits for vacation payout, sick time payout or severance pay when an employee leaves the position or upon contract termination or program closure.

**Budget Modifications**
Requests for spending outside of the budget must be done prior to incurring the expense even if the requested amount is under the threshold requiring a budget modification. All requests must start with a discussion with the assigned Contract Manager to determine if the programmatic activity associated with the change in expenditures is necessary. The request must be documented in writing. CBHC will then approve or deny the request(s) in writing with further instructions.

**Requests for spending outside of the approved budget of less than 10% or $500 of a subtotal line:**
Prior approval is required for items not included in the budget. As part of the request and approval
process, to counteract any over-spending, CBHC staff and the provider agency will also identify an area where under-spending will likely occur. The request will be approved or denied in writing. No change in the Total Approved CBHC Budget column of the cost reimbursement request form will be necessary.

**Requests for spending outside of the approved budget of more than 10% or $500 of a subtotal line:**
Prior approval is required for items not included in the budget. Budget modifications are required if spending of more than 10% or $500 (whichever is greater) in a budget category (Salaries, Benefits, Contractual Services, Occupancy, and Other). Once the request has been discussed with the assigned Contract Manager, submit the budget modification form provided with the executed contract. Instructions for completing a budget modification are included in the excel file (Bud Mod Justification & Instruc tab).

All requested changes must include a narrative, both for the increased and decreased items on tab #2 of the form. The narrative should describe the reason for the change(s), how the new amount was calculated and how the change will affect services being delivered. If a PDF of the signed form is submitted, please make sure the narrative text box has been fully expanded.

Once the budget modification is approved, the Cost Reimbursement Request form may be updated to include the new amounts in the Total Approved CBHC Budget column.

**Lead Agencies with Sub-contractor(s) -** The lead agency must first discuss the requested sub-contract modification with the assigned Contract Manager. If preliminary approval by CBHC and the lead agency is granted, then the lead agency submits a budget modification form to the Children’s Board Contract Manager and Fiscal Representative for final CBHC approval.

**Note: Final budget modification requests are due by July 1st.**

**Budget to Actual Report**

The budget to actual report is required in order to explain the differences between the approved budget items and the actual spending for the period of time covered in the report. The budget to actual report is submitted quarterly (see due dates in contract).

This report includes both the total program revenue and expenditures. An explanation is required for any variance greater than 10%. These explanations should be included at the bottom of the form in the section titled “Variance Report”.

**Fiscal Site Visit**

Fiscal Representatives conduct an annual site visit of direct and lead agency contracts to review back up support for a sample of reimbursement requests submitted. A list of requested items will be furnished to the provider agency two (2) weeks in advance of the scheduled site visit.

**A Fiscal Site Visit Interview Form** (Appendix B) must be completed by the agency and submitted to the CBHC Fiscal Representative no later than three (3) business days prior to the site visit.
Site visit reports document whether:

- The Fiscal Site Visit Interview Form was completed no later than three (3) business days before the site visit.
- The provider had all requested information ready and organized for CBHC staff to review upon arrival.
- There was documentation of a process in place to review invoices to determine that the expenses were related to the contract.
- Invoices were paid prior to including the expense on the reimbursement request.
- The correct percentage was charged to CBHC based on the approved budget.
- The backup documenting how the allocations were calculated was available, if there were allocated expenses.
- There was backup for all expenses included on the reimbursement request.
- Funds were spent according to the approved budget.

*Lead Agencies with Sub-contractor(s)* - Lead agencies with sub-contracts are responsible for conducting site visits for all sub-contractors prior to the CBHC site visit or by March 31, whichever occurs first. Sub-contractor reports are to be submitted with the Fiscal and Organizational Site Visit Interview Form.

**Annual Contract Evaluation and Recommendation for Continuation Funding**

Program contracts are evaluated annually in order to make recommendations to the CBHC Board for continued funding until the end of the grant period. The evaluation form includes administrative compliance, program performance, and fiscal accountability reviewed periodically in May, August, and November. The latest evaluation document can be found on the Children’s Board website.

*Lead Agencies with Sub-contractor(s)* – Contractual expectations for both Lead agencies and sub-contractor responsibilities are scored as a way to provide monitoring and guidance for improvements if necessary.

**Provider Improvement Plan**

This process is used when funded agencies have programmatic, administrative, or fiscal issues, or are non-compliant with the CBHC General Terms and Conditions. The latest Provider Improvement Plan Procedure can be found on the Children’s Board website.

**Administrative Services Organization (ASO)**

Designated case management programs are provided with an ASO allocation. ASO flexible funds are utilized by case managers as a payer of last resort to purchase services for participants in the CBHC funded program. All programs receiving an allocation are monitored each year. The guidelines for the use of ASO funds is included in Appendix (C) and the ASO Monitoring Protocol is included in Appendix (D).
ASO monitoring reports document the following:

- If the service or support purchased by the ASO relates back to a goal or a need in the Family Support Plan.
- If there is evidence that the family actually received the service or support.
- If guidelines were followed by the agency receiving the allocation.

Refer to Appendix documents for more detail.
APPENDIX A – CONTINUATION BUDGET INSTRUCTIONS

CONTINUATION BUDGET INSTRUCTIONS

Please refer to the Children’s Board preliminary funding recommendation by program provided in the e-mail sent to your agency for an “up to” total contract amount for the next year.

Special Note: Board approved funding recommendations are subject to change during contract negotiations.

The Children’s Board Continuation Budget provides specific revenues and expenditures for the program to be funded by the Children’s Board for the next contract period. This includes the total program budget for the entire program including expenses reimbursed by other revenue sources. The budget should include the total cost of the program.

All costs included in the budget should be necessary based on the program model contributing to the outcomes or deliverables.

The Excel budget forms consist of three (3) tabs, the budget summary, salary detail, and the budget narrative.

Each budget item must include a narrative describing the total program expense(s) or revenue and how the amount is calculated. In the event that you are allocating a portion of already existing expenditures to the budget, provide the total amount of the agency expenditure and the detail of how the amount budgeted for the direct use of the program was calculated. The allocation of existing agency expenditures should be done by exception only when the expenditures directly relate to the proposed outcomes.

Special Notes:

Do not use acronyms in the narrative.

Do not add or change categories or line items listed on any of the budget forms.

REVENUE

All revenue sources for the program (not agency) must be listed individually.

If the budget is for a lead agency with sub-contractor(s), list all revenue sources for the sub-contractor(s) in the lead agency budget in the total program columns noting the sub-contractor agency’s name that generated the revenue on each line.

Children’s Board Allocation:

On the Summary: include the CBHC contract amount in both the total program budget column (2) and the CBHC budget column (5). Do not include any ASO allocation in this line.

Other Funding Sources:

List each source of revenue for the program on a separate line by individual funder or type of
revenue. This includes other grantors, contributions, fund raising events, etc. Include the following information in the narrative: if the revenue source pays for or does not pay for certain expenditures, if the revenue source has a required match and the length of the match commitment, and if the revenue source is time limited.

**Special Note:** Evidence of a required match must be provided to the assigned contract manager if CBHC funding is considered a “match” contract.

If the agency is providing cash in order to balance the budget, include this revenue source on a separate line.

List in-kind revenue on a separate line and describe what is being provided in the narrative. Be specific when listing in-kind revenue (for example in-kind rent, in-kind volunteers, and in-kind food).

**Children’s Board ASO:**

If your program is receiving an Administrative Services Organization (ASO) allocation, include the amount in this section as a line item (and in the expenditures section in the total program budget column).

**Total Revenue:** Sum of all revenue lines.

**EXPENDITURES**

All costs included in the budget as a direct expense should be necessary based on the program model contributing to the outcomes or deliverables listed in the contract. Costs that are not a result of direct services for participants of the program should not be included as a direct expense. If included, the costs will be removed and the budget may be reduced as these costs are paid for in the administrative/indirect section of the budget (for example, including a data entry position as a direct expense in the budget). Review list of unallowable costs.

The purpose of the narrative is to describe how the total program budget amounts were calculated for each line item in the budget. It is not necessary to justify the reason for the expense.

If other funding sources will be paying for a portion of the expenditures in a line in the total program budget, described which items will be paid for by CBHC in the narrative for that line item.

**Salaries:**

List positions on both the salary detail and the budget narrative in the same hierarchical order. The position titles used should be the agency position title and be consistent on each form.

The amount included in the program budget should only be the percentage of the Full Time Equivalent (FTE’s) providing direct services for this program in order to successfully complete contract outcomes.

Examples of administrative positions not to be included on the salary detail form as a direct expense
and are considered to be administrative/indirect positions as a general rule are staff in finance, human resources, information technology, administrative support, data entry, executive directors, or positions at a level higher than program directors. Including these positions as a direct expense must be pre-approved.

**Salary Narrative:** Include a brief description of the duties for each position, including if the position requires a person to be bilingual, or if the position is working in a specific geographic region. List the region(s) name or zip code(s) in which the position will be working in the narrative. If a position is not 100% allocated to the program, provide the method of calculating the percentage allocated to the program in the narrative section by explaining the percentage of time spent on each direct activity.

By exception, if the CBHC contract is less than $600,000, an Executive Director (ED) position may be allocated across all CBHC programs as a direct expense at a program percentage of between 5% and 50%. A description of tasks performed by the ED that relate to direct service and the percent of time spent on each task must be included in the narrative. Exceptions may be made for an ED of newly funded programs and those with budgets under $300,000. An ED may not be allocated to the budget as a direct expense if there are already two levels of supervision/management included in the budget.

*Special Note: CBHC may request a time study and/or ongoing documentation of time spent on direct service activities for those positions allocated to the program at less than 100%.*

**Salary Detail:**

Enter the information requested in each column for each position. Take the time to review each column and verify that all of the information is correct based on the duties of the position for the agency and program and the amount of CBHC funding allocated for each position.

- **Name and Position Title** - The name of the individual occupying the position, if known, and the title of the position (should be consistent with the organizational chart and job description).

- **Agency FTE** - Please state whether the position is a full-time position (1.0 FTE) or part-time position with the agency. If part-time, indicate the percentage of full-time (e.g. .50 FTE).

- **GROSS ANNUAL SALARY** - Total annualized salary (expense) to the agency for each position.

- **% OF TIME IN PROGRAM** - Percentage of time spent directly on program activities regardless of funding source (total program expense).

- **Total Program Salary** - Total salary expense of the program. The gross salary amount is multiplied by the percentage of time in program to determine the total program salary.

- **CBHC Amount** – The total salary expense of the program that is charged to the Children's Board. The amount cannot exceed the Total Program Salary.
Example: A case manager works 30 hours per week for the agency and will be working 50% of that time for the program. CBHC will be paying for half of that expense. Another funder is paying for the other half.

<table>
<thead>
<tr>
<th>Name and Position Title</th>
<th>Agency FY 2019</th>
<th>FY 2019</th>
<th>FY 2019</th>
<th>FY 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Name</td>
<td>FTE</td>
<td>Gross</td>
<td>% of Time</td>
</tr>
<tr>
<td></td>
<td>Tom Jones</td>
<td>.75</td>
<td>26,000</td>
<td>50%</td>
</tr>
<tr>
<td></td>
<td>Position: Case Manager</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

Benefits:

Include fringe benefits paid to or on behalf of employees including Federal Insurance Contributions Act Taxes (FICA), unemployment compensation, workers’ compensation, health and life insurance, retirement, long term and short term disability, and/or cafeteria plan benefits. List the amount budgeted for each line item separately including rates or percentage of salary expense. Explain how the dollar amounts were calculated in the budget narrative including rates or monthly amount.

Special Note: Payroll processing fees are not allowable as a direct program expense as these costs are considered administrative/indirect.

Contractual Services:

Sub-contractor Partners – If your agency is a lead agent, include the total amount of those agencies contracts that contribute to the outcomes of the contract. All sub-contractor partners must be listed on Attachment (4).

Lead Agencies with Sub-contractor(s): The administrative/indirect allocation for the lead agency is limited to 10% of the first $25,000 of each sub-contract (for a maximum admin/indirect expense of $2,500 for each sub-contractor partner). Each sub-contractor is also allowed 10% administrative/indirect expense in its individual budget. See the administrative/indirect cost section for an example calculation.

Other Contractual Services - Include costs of services rendered to the program by independent professional practitioners and/or consultants. List each vendor and/or type of professional service separately with a brief description of the service and how the amount was calculated. Include the estimated rate and unit of service.

Occupancy Costs:

Indicate the dollar amount budgeted for the space used to provide services and/or house direct service program staff in Hillsborough County. If services included in the contract are for participants living in a residential facility, do not include occupancy costs associated with the residential facility.

Only include the projected expenditures in order to provide the services described in the contract. In the event that you are allocating a portion of already existing expenditures in the budget, provide the total amount of the agency expenditure and the detail of how the amount budgeted for the direct
use of the program was calculated. The allocation of existing agency expenditures should be done by exception only when the expenditures directly relate to the proposed outcomes. Be consistent with the percentage allocated when doing so in more than one line item.

Expenses other than those listed below are unallowable expenses.

**Building Lease/Rent:** Indicate what the median cost per square foot in the area of the property rented. Include the cost per square foot of the rented space, total square feet and the amount of the space being allocated. If other services are being provided in the same space during the facility’s available hours, the % of total rent allocated should be adjusted. Include in-kind rent (if any) on a separate line in the rent line item. Include a budget narrative that clearly describes the methodology for how the costs were calculated. If staff spend the majority of the time out in the community, individual office space should not be budgeted for all of those staff. Shared touch down space may be budgeted.

*Special Note: Children’s Board funds cannot reimburse for costs included as rent/lease to an agency that owns its building or for mortgage expenditures. See the occupancy allocation description.*

**Occupancy Allocation:** *This line item is only used when the building is owned by the agency:* An occupancy allocation can be budgeted that includes expenditures directly related to the general maintenance of the assigned square footage if those items are not being charged in the other lines in the occupancy category.

- Items that may be included in the allocation are utilities, janitorial service for areas utilized by participants, property insurance, A/C general maintenance, minor maintenance to space utilized by participants, monthly electronic security systems, and fire extinguisher maintenance.

- Items that cannot be included in the allocation are mortgage payments (interest and principal), depreciation, taxes, major maintenance projects, pest control, capital improvements, lawn maintenance, maintenance staff, and security staff.

Clearly explain what expenses are included and how the allocation was calculated in the narrative.

**Special Notes:**

- *A full allocation plan including the specific items, amounts and method of allocation must be submitted with the budget and pre-approved by CBHC.*

- *Back up documentation detailing the expenses included and how the allocation was made to the program must be pre-approved prior to submission with each monthly reimbursement request.*

**Janitorial Expense:** Include the cost of regular cleaning services of the space utilized by participants and its frequency. Allocate the share of the expense based on the square footage used by the program participants. Do not allocate cost for staff offices unless the space is used by program participants.
**Property Insurance:** Include the allocated cost for property insurance in this line if it is not included in the insurance line in the other operating cost section. Describe the total property insurance cost for the agency or building and how the cost for the program was allocated.

**Security:** Include the cost of monthly monitoring of a security system. Allocate the share of the expense based on the square footage used by the program participants. Do not include the cost to purchase or install a security system or the cost of security personnel.

**Telephone/Internet:**

When budgeting items in this line item (and computer supplies), keep in mind that if staff are out in the community instead of working in an office, costs for land lines, office internet, etc. should not be budgeted in addition to costs such as cell phones, air-cards and laptops or tablets.

**Land lines:** In general, the monthly cost of an existing agency phone system (land lines) is considered to be an administrative/indirect expense. However, if additional CBHC funded program staff are hired by the agency, and taking phone calls is a program activity, for these additional staff, any marginal cost incurred for additional phone system services for these additional staff may be included in the budget as a direct expense. If amounts for land lines include an allocation of a portion of the total agency cost, include the method of calculating the amount being allocated to the program.

**Cell phones:** For safety purposes, the monthly cost for voice service for cell phones may be included for direct service staff providing community based services at a maximum of $35 per month per FTE. List the position(s) being provided a cell phone or stipend and the cost per FTE. If the FTE is less than 100%, prorate the monthly cost based on the FTE percentage. Do not include the cost of purchasing cell phones or accessories for the cell phones.

**Internet:** Describe the total cost for the office internet and how the percentage was allocated for the direct use for the program. Do not allocate a portion of an existing internet or wireless system. Include cost for air cards or data plans for laptops or tablets used in the field for positions providing community based services that document services while out in the field at a maximum cost of $45 per month. List the positions being provided data plans or air cards. If the FTE is less than 100%, prorate the monthly cost based on the FTE percentage.

**Utilities:** Describe the specific types of utility costs and the total cost for the agency or building and how the cost for the program was allocated. Allocate the share of the expense based on the square footage used by the program participants. Do not include cost of garbage pick-up.

**Example Narratives:**

- Building Lease/Rent – The building is 6,000 total square feet at a cost of $12 per square foot. Total annual rent for the building is $72,000. The program uses 40% of the space. Total
program rent is $2,400 per month or $28,800 per year.

- Property Insurance - Total annual agency property insurance is $4,000. Total program expense for property insurance is $1,600 based on the use of 40% of the space of the building.

**Other Operating Costs:**

Other Operating costs are those costs directly related to providing program services. **Provide specific detail in the narrative section of what will be purchased, the quantity (if applicable), and cost for each item requested. Describe how the amount was calculated in each category below.** If amounts include an allocation of a portion of the total agency cost, include the total agency costs for a line item and the allocation method of calculating the program amount.

**Local Travel (Mileage):** This is the cost for travel in Hillsborough County for employees listed on the salary detail only, to provide services to clients, attend program related meetings, or attend local training events. Reimbursements will not be made for travel from or to the person’s residence or the destination that is a regularly assigned work location. Therefore, if the person’s headquarters or primary work location is their residence and their work locations change daily, the initial mileage to their first work location and the mileage from their last work location to their residence each day are not reimbursable. If a provider agency office is not in Hillsborough County, the cost of driving from the office to the first destination in Hillsborough County is unallowable.

Describe the estimated miles, rate paid (up to the federal rate - see [www.gsa.gov](http://www.gsa.gov) for current rate), position(s) to be paid, and the total number of positions or FTE’s.

*Special Note: When CBHC reviews the information from this line item during the annual fiscal site visit, the purpose for the local travel must be clear on the employee reimbursement form.*

**Training/Conference Expense & Travel:** CBHC will pay for conferences directly related to the tools/outcomes in the contract and program model. Include the name of the conference, the cost (known or estimated) of the conference registration, travel (air or out of town mileage), hotel, and meals as applicable in this line item for staff included in the salary detail or program participants. Include number of attendees and their positions. If the conference is out of town, transportation to and from the airport and hotel may be included in the budget. Meal expense should be budgeted by using the federal rate (see [www.gsa.gov](http://www.gsa.gov) for Meal Expenses Breakdown). Actual meal expense is not reimbursed. If a meal is provided at the conference, CBHC does not reimburse for that per diem meal. Do not include the cost of a rental car unless pre-approved by CBHC.

*Special Note: Do not include the cost to attend Nonprofit Leadership Center trainings, the Early Childhood Council conference, or the REACHUP Affirming Fatherhood conference as the CBHC contributes to the cost of the conferences directly to those agencies.*

**Transportation for Clients:** Include vehicle rental, bus passes, cab vouchers, and/or any other expense to transport clients to services or events.
**Special Note: If using an agency vehicle:**

- Allowable expenses include the expense for a driver and fuel for the actual vehicle used for the program. Do not include vehicle maintenance.

- If allocating vehicle expenses, a full allocation plan including the specific items, amounts and method of allocation must be pre-approved by CBHC.

- Back up documentation for the monthly expense detailing the expenses included and how the allocation was made to the program must be pre-approved prior to submission with a reimbursement request.

- Do not include the cost of purchasing or leasing a vehicle.

**Rent & Lease/Equipment:** Include the rental cost for new equipment leased for the program. Describe the total cost and how the percentage was allocated for the direct use for the program. Do not allocate existing agency expenses in the budget. Do not include copier lease if including per copy cost in printing & copying.

**Insurance:** Include the cost for liability and vehicle insurance in this line. Property insurance can be budgeted in this line or in the occupancy section. Describe the total insurance cost for the agency and how the cost for the program was allocated.

**Postage:** Explain how the amount was calculated and the purpose of mailing items.

**Printing & Copying:** Include outside printing cost and per copy copying cost (if lease expense for a copier is not charged in the equipment lease lines). Describe specific items to be printed in the narrative if known.

**Advertising:** Include advertising for vacant positions or legal ads only.

**Outreach:** Include announcements or promotions for program services, activities, or events, purchases of give-away items for outreach events, and vendor fees. Include a description of where the ads will be purchased and/or what types of items will be purchased for possible future clients.

**Memberships/Subscriptions/Licenses:** Only include memberships that are associated with model fidelity. Do not include general agency memberships. Be specific if the membership is purchased for the agency or a staff member (title) in the budget narrative.

**Fingerprint & Background Screening (volunteers):** Include costs for volunteers only (including interns). Costs for fingerprinting employees are considered to be an administrative/indirect cost (see the administrative/indirect section).

**Information Technology (IT) Expense:** This line should be used by exception and must be pre-approved by CBHC. Include IT expense for data systems accessed by participants and used specifically to generate information for reporting on CBHC outcomes and demographic information in this line. Support to a computer lab for participants may also be included. Provide detail of what this is paying for and how the amount was calculated. Do not include allocation for general agency IT expense such as software cost, maintenance, servers, and/or
staff as these costs are considered to be administrative/indirect.

**Office Supplies:** Provide detail of what will be purchased if known and how the amount was calculated. A maximum of $25 per month per FTE may be allocated to the program budget if the amount was calculated as an allocation per FTE.

**Computer Supplies:** Includes computers, software, printer ink and other computer supplies. If computers are to be purchased, list which position(s) will use the computers or if the computers are for participants. CBHC will pay a maximum of $400 per computer including accessories (keyboard, mouse, monitor, docking station, etc.). Computers may be replaced after 3 years.

**Operating Supplies:** Include consumable supplies, such as program cleaning supplies and paper products for use with program participants.

**Educational/Curriculum Supplies:** Include all supplies that staff or clients use during program activities (these are items that do not go home with clients or participants).

**Evaluation Supplies:** Include tools and/or questionnaires purchased in order to evaluate the program and/or participants in this line.

**Training Supplies:** Include the cost of supplies when the program is providing the training for the community, program participants or staff members.

**Client / Participant Supplies:** Include consumable materials and items given to the client to take with them that supports program outcomes. Examples are educational toys, written educational materials, prepaid cards, snacks, school supplies, safety products, and basic needs items not covered through the ASO.

*Special Note: If prepaid cards are purchased with CBHC funding, a quality assurance system must be in place to track the purchase of and delivery of the card to the participant. This should function similar to a petty cash process. Participants/family members should sign a document acknowledging the receipt of the card. If the program has an ASO allocation, the prepaid card should be purchased through the ASO instead of the program contract.*

**Community Activities & Events:** Include items purchased for group or community activities including events with volunteers that support program activities in this line. Describe the activity, frequency, and estimated cost per each item/activity. Examples include: food, volunteer stipends, items for events, community service projects, or the cost for field trips (for educational activities included in the matrix to support service delivery model).

**Family Advisory Council:** Include expenses for Family Advisory Council(s) comprised of program participants in this line. This includes items directly associated with the budget managed by the Family Advisory Council.

**In-Kind Expense:** Include the monetary value of all services and items donated to the program except in-kind rent (included in occupancy) on this line. List each type separately, for
example, volunteers, donated goods, food, etc.

**ASO Flexible Funds:** Include expenses when a case management program has an ASO allocation. Include the amount requested for the year. This amount should be the same as the Children’s Board ASO revenue amount (see the revenue section).

**Administrative/Indirect Cost:**

Includes the administrative costs associated with operating the program (if applicable), which are not directly attributable to direct program services.

**New Requirement:** This line requires a budget narrative for the total program amount, describing the type of expense and how the amount was calculated for each type of expense. Provide the same detail as all other line items in the budget. Include the type of expense or position and how the amount for each area was calculated.

Examples of expenditures considered to be administrative are: executive staff, fund development, fund raising, information technology staff and expenditures, administrative and data entry staff, human resources (including fingerprinting and background screens for employees), the cost for an agency audit, and fiscal staff (including payroll processing fees) or responsibilities.

The CBHC administrative/indirect costs cannot exceed 10% of the total direct expenditures.

**Lead Agencies with Sub-contractor(s):** The administrative/indirect budget for the lead agency is limited to 10% of the first $25,000 of each sub-contract (for a maximum administrative/indirect expense of $2,500 for each sub-contractor partner). Each sub-contractor is allowed 10% of the direct expenditures for administrative/indirect expense in its budget.

**Lead Agency calculation example when a sub-contractor over $25,000 is involved:**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Direct Expenses</td>
<td>$1,200,000</td>
</tr>
<tr>
<td>Less 2 Sub-contract</td>
<td>(800,000)</td>
</tr>
<tr>
<td>Net Direct Expenses</td>
<td>400,000</td>
</tr>
<tr>
<td>CBHC Indirect/Admin</td>
<td>40,000</td>
</tr>
<tr>
<td>Plus allowance on sub-contracts</td>
<td>5,000</td>
</tr>
<tr>
<td>Total CBHC Admin/Indirect</td>
<td>$45,000</td>
</tr>
</tbody>
</table>

The total program administrative/indirect amount is not restricted. Budget for the actual administrative cost associated or allocated with the program in the total program column.

**Total Expenditures:** Sum of all expenditures. This line is automatically calculated. Please do not change the calculated cells throughout the document.

**Excess (Deficit):** Difference between total revenue and total expenditures. No budgeted excess or deficit is allowed.
Reminder of Unallowable Costs:

The following items are unallowable. This information is also included above in each category.

Occupancy:

- rent for storage space
- mortgage payments (interest and principal)
- interest
- depreciation
- taxes
- major maintenance or capital improvements (improving assets, repairing the roof)
- lawn maintenance
- maintenance staff
- security staff
- security system purchase and installation
- pest control
- garbage pick-up (waste bin fees charged on water bill)
- costs associated with a residential facility
- cell phones for staff other than direct services staff out in the field for safety purposes
- the allocation of existing costs of an agency that do not directly relate to producing outcomes in the contract

Other Operating Costs:

- local travel from the person’s residence to the destination that is a regularly assigned work location
- if a provider agency office is not in Hillsborough County, the cost of driving from the office to the first destination in Hillsborough County
- rental cars
- vehicle lease or purchases
- vehicle maintenance
- If the program has an ASO allocation, ASO allowable expenses should be purchased through the ASO instead of the program contract
- the allocation of existing costs of an agency that do not directly relate to producing outcomes in the contract
- equipment maintenance
- postage machine rental or purchase
- cost for shredding
- cost for scanning
- religious materials
APPENDIX B – FISCAL AND ORGANIZATIONAL SITE VISIT INTERVIEW FORM

FISCAL SITE VISIT INTERVIEW FORM

<table>
<thead>
<tr>
<th>AGENCY:</th>
<th>PROGRAM(S):</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>DATE &amp; TIME OF SITE VISIT:</th>
<th>CBHC STAFF TEAM:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>AGENCY REPRESENTATIVES:</th>
<th>MONTHS IN REVIEW:</th>
</tr>
</thead>
</table>

Please complete one form per site visit (one per agency)

Fiscal Site Visit Process

The Fiscal Representative conducts a site visit each year to review back up support for a sample of reimbursement requests submitted. This Fiscal Site Visit Interview Form and any other attachments must be completed by the agency and submitted to CBHC three (3) business days prior to the site visit.

Lead Agencies with Sub-contractor(s) must perform site visits for all subcontractors by March 31, or prior to CBHC site visit, whichever occurs first.

Fiscal Review Preparation Checklist

- The following documentation for all expenditures charged to the CBHC must be available for review at time of the site visit for the month(s) of:
  - Back Up Documentation (Invoices, PO’s, Contracts, Receipts, Expense Reports, etc...)  
  - Check/EFT Copies  
  - Bank Statements  
  - Payroll Reports  
  - Timesheets  
  - General Ledger Reports  
  - Accounting Policies and Procedures  
  - Allocation Method for shared expenses
**How will this documentation be provided (electronic format or hard copy)?**

**Fiscal Review Questionnaire**

1. Describe your system for allocating expenditures to two (2) or more programs or funding sources.

2. Describe your internal control process for reviewing documents prior to submission to CBHC.

3. What is the average number of days that checks are outstanding?

4. Does your agency have a Line of Credit? If so, for how much and what is the amount available at this time? What are your guidelines for its use?

5. What, if any, fiscal challenges/opportunities will the organization face in the next (1-2) years?

6. Has your agency made any changes in response to your fiscal score on the most recent CBHC Agency and Program Rating Tool or Fiscal Site Visit?

7. Have any of your revenue sources decreased in the last year? If so, describe changes made on the expenditure side.

8. Has your agency received unanticipated revenue this year? What is the plan for this funding? Does it relate to the current CBHC funded program?

**Please submit the following reports, if applicable:**

- Fiscal monitoring reports from other funders
- If you are a lead agency with subcontractor(s), list the dates of fiscal site visits of your subcontracted partners. *Attach all reports.*
Guidelines for Use of ASO Funds

Established Fiscal Year 2011
Updated February 28, 2018

The Administrative Services Organization (ASO) is a financial tool used to help children and their families identify, select, arrange, and pay for supports and services with qualified community providers. The ASO supports a wraparound process in which case managers work with families to identify their strengths, goals, needs, and their own service providers through the development of a family support plan. ASO funds are to be used as a last resort; case managers are responsible for helping families locate services and supports funded by other sources or through natural supports.

General guidelines for the use of ASO funds are as follows:

1. Funds are allocated to participating case management programs and families’ access to ASO funds is dependent on eligibility specific to those programs.
2. Each service and support must directly relate to a goal or a need expressed in the individual family support plan and must be documented in the plan.
3. All other resources should be exhausted before using ASO funds, including Medicaid, insurance, community resources, natural supports, and the family’s ability to pay.
4. If the ASO expenditure is for a recurring need (e.g. rental assistance), the case manager should document how this recurring financial responsibility will be addressed in the future.
5. The development of a personal budget with the family is strongly encouraged, especially if the ASO expenditure relates to economic stability or basic needs assistance.
6. Families should be given choice in services provided to meet their identified needs, as well as choice in the providers who deliver the services.
7. All ASO requests must be approved by the program supervisor.
8. The case manager must document the use of ASO funds in their client record for the family and include evidence that the family received the service or support in the form of receipts or provider progress notes or reports.
9. The case manager must have a consent form signed by the parent or guardian authorizing exchange of information with the Children’s Board and the ASO provider as applicable.
10. If pre-paid purchase cards are used for any ASO expenditure, the family must sign the Pre-Paid Card Form acknowledging receipt of and purpose for the card. This form must be filed in the client record, along with the itemized receipt for the purchases.
11. The ASO funding agency defines allowable services for their funding source, may establish additional guidelines and policies, and is responsible for monitoring the use of their ASO funds at the program level.

Restrictions regarding the use of ASO funds are:

1. The ASO only issues payments in the form of a business check. The ASO does not provide payments in the form of cash, cashier’s check, or money order. There are exceptions in which the ASO credit card is used and any exceptions must be approved by the ASO Manager or designee.

2. ASO funds may not be disbursed directly to families; rather payments should be issued directly to the provider of goods or services.

3. ASO payments for Childcare Support may not exceed twenty (20) days of service per fiscal year. (Children’s Board funds only)

4. Before ASO funds can be used to pay first month’s rent or security deposit, the property must pass an inspection completed by an ASO-approved Housing Specialist. Documentation of the successful inspection must be submitted to the ASO prior to budget approval and the inspection report should be filed in the client record.

5. The ASO can only issue payments to utility companies if the bill is in the name of an adult household member or owner of the property. ASO funds cannot cover tampering fees, returned check charges or restitution.

6. ASO funds may not be used for the following:
   a. Expenses related to criminal activity, including related legal fees, court costs, citations, restitution, etc.
   b. Alcohol, tobacco, firearms, or lottery tickets
   c. Expenses related to immigration or returning a family to their country of origin
   d. Residential treatment
   e. School tuition for primary or secondary education (K – 12)
   f. Purchase of property or payment of mortgages
   g. Holiday gifts or decorations
   h. Entertainment venues

7. If there is not sufficient back-up documentation for the services and supports purchased with ASO funds, or the funds are not spent as authorized in the family support plan, the Children’s Board will seek reimbursement of the ineligible expenditures from the case management agency.
ASO Monitoring Protocol  
*Established Fiscal Year 2011*  
*Last update December 4, 2017*

Routine - ASO fiscal monitoring is done on an ongoing basis. Financial documentation is submitted by providers and case managers and reviewed by ASO staff for all payments, as evidence that flexible funds were used as authorized by the program. Automated tracking systems in the ASO web application are utilized for monitoring submission of receipts, for payments that are issued in advance of receiving back-up documentation.

**Standard reports** are utilized for monitoring ASO expenditures by the following stakeholders:

1. Families – ASO Spending Summaries are mailed to families monthly so they can review and manage ASO services to verify their receipt of services that have been paid.
2. Case Management Programs – The ASO web application enables case managers and supervisors to generate detailed payment and utilization reports at any time. Guidance for Monitoring ASO Services is available on the ASO web application, under Policies and Procedures.
3. Funding Agencies – Through the ASO web application Funder Login, standard ASO reports are available to funding agencies that provide information about utilization, service trends and spending. Funding agencies can also generate custom reports, including detailed data reports to be used for monitoring and site visits.

Annual – For Children’s Board ASO funding, programmatic and fiscal monitoring is conducted through site visits on an annual basis. This in-depth monitoring occurs at the case management program level and is performed by Children’s Board ASO staff. Other funders may designate the Children’s Board to provide this function.

**Prior to the site visit:**

1. A detailed ASO Budget Item Report is generated for the case management program that lists all budget items (authorizations) for families enrolled by that program.
2. 10% of the total families with ASO budgets, or a minimum of 10, are randomly selected for review.
3. The ASO sample is sent to the program supervisor at least one week before the site visit.

**During the site visit:**

1. The client record is reviewed and the following questions are answered:
   a. Does the service or support purchased by the ASO relate back to a goal or a need in the Family Support Plan? (Source: Family Support Plan)
b. Is there evidence that the family actually received the service or support? (Source: receipts, provider progress notes/report, bus pass forms)

c. If client information is released to facilitate the service, is there a consent form signed by the parent/guardian to exchange of information with the ASO provider and Hillsborough County BOCC, if applicable?

2. During the client record review and the interview with the program supervisor, the reviewer also assesses adherence to the Guidelines for Use of ASO funds, with special attention to the following:
   a. How are case managers documenting that the ASO is the payer of last resort?
   b. How are families given choices in the type of service offered to meet the need, as well as the provider? How is that family choice documented?
   c. How do case managers monitor service delivery and quality?
   d. Are case managers consistently following the ASO Pre-Paid Card Policy?
   e. For Childcare Support, did payments fall within the limit of 20 days of service per fiscal year?
   f. Is the completed housing inspection in the file for First Month’s Rent and Security Deposit (CBHC and County funds) and Rental Assistance payments (County funds)?
   g. Is the program obtaining consent forms signed by the parent/guardian authorizing exchange of information with the Children’s Board, Hillsborough County BOCC (Social Services funding only), and ASO providers as applicable?

3. All findings are documented on the ASO Monitoring Summary and Checklist, which is provided to the program supervisor and the contract manager and included in the contract file.
   a. If there is not sufficient back-up documentation for the services and supports purchased with ASO funds, or the funds were not spent as authorized in the family support plan, the Children’s Board will seek reimbursement of the ineligible expenditures from the case management agency.
   b. If the site visit reveals significant concerns regarding a program’s compliance with ASO policies and procedures, the provider may be placed on a Provider Improvement Plan and/or may lose access to ASO funds for that program.

4. Aggregate findings from all program site visits will be compiled by ASO Manager and summarized for reporting at the Children’s Board Program Support Meeting and the ASO Supervisors Meeting. Findings will include any recommendations for additional training and/or procedure changes.
ASO BACKGROUND

The Administrative Services Organization (ASO) is a project operated by the Children's Board to manage flexible funds. Created in 2003, the ASO supports a wraparound approach in which families identify their strengths, needs, goals, and service providers through an individualized family support planning process. Payment as a last resort, flexible funds managed by the ASO may be used for supports and services with qualified community providers.

Under the ASO model, trained case managers work with families to develop individualized plans and select a wide range of services and supports. Once services are identified, the ASO contracts with providers and funds the supports and services children and their families need. Families are able to prioritize the services that they need the most and select a provider of their choosing. The ASO is responsible for developing and maintaining a database of local service providers, and ensuring they meet credential requirements. The ASO manages and tracks expenditures and issues monthly reports directly to families and funded agencies. Additionally, the ASO administers quality management surveys to families, case managers and providers and monitors programs annually.

At this time, eighty-five service types are available from a fully credentialed provider network that includes hundreds of agencies, vendors, individuals, local businesses, and faith-based organizations. A few examples of how ASO funds may be used are tutoring to support academic goals, bus passes to provide transportation to work or needed services, or the purchase of cribs or beds to provide a safe sleep environment.

INTENT OF ASO FUNDS

A key component of effective case management and family support is access to discretionary funds that can be used to individualize supports and purchase a wider variety of service options for families. ASO funds are made available to programs funded by the Children’s Board that provide case management and identify services, interventions, and supports that may be needed to fulfill family support plans, including supports that are not reimbursable via traditional systems.

Children’s Board ASO staff manages the flexible funding and allocations are made available to programs, as opposed to the funds being included in their program award. As funding awards are made, ASO funds may be allocated during the contract negotiation process. Applications may mention the use of flexible funding in the program description and how these services would be used as part of the program’s overall strategy to support families.
Requirements for Participation as an ASO Case Management Program

1. The program must employ some form of case management/family support as a service strategy, either as a primary strategy or in conjunction with other service strategies.

2. Individualized family support plans must be a component of the service strategy. Services and supports purchased with ASO funds must relate to a specific goal in the family’s plan.

3. Supervisors and case managers must have training in case management using a system of care approach, prior to access of ASO funds. This training can be accessed from Success 4 Kids and Families if needed. The training is a one day, seven-hour training, at the rate of $75 per participant.

4. Supervisors and case managers must attend ASO training (3-hour Overview and Web Application Training) which is provided by the Children’s Board at no cost to the participant.

5. Program supervisors are required to attend bi-monthly ASO Supervisors Meetings.

6. ASO funds requested from the Children’s Board must be used in accordance with established values, policies and procedures which are provided in ASO training and posted on the ASO web application.

7. The program must participate in annual monitoring by the Children’s Board, including records review of families who benefitted from ASO funding.
Mission Statement: The Children’s Board invests in partnerships and quality programs to support the success of all children and families in Hillsborough County.

<table>
<thead>
<tr>
<th>Organization:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program Name:</strong></td>
<td>Management of (7) Children’s Board Family Resource Centers in Hillsborough County</td>
</tr>
</tbody>
</table>

### 2.1 Cover Sheet and Signature Page (maximum 2 points)

<table>
<thead>
<tr>
<th>Score</th>
<th><strong>Score _____</strong></th>
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</thead>
<tbody>
<tr>
<td>Please submit a completed Cover Sheet, Attachment (#2), with your submission.</td>
<td>(2) – All fields completed correctly.</td>
</tr>
<tr>
<td></td>
<td>(1) – Some fields not completed correctly.</td>
</tr>
<tr>
<td></td>
<td>(0) – No fields completed correctly.</td>
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</tbody>
</table>

### 2.2.1 Organization and Personnel (maximum 12 points)

<table>
<thead>
<tr>
<th>Score</th>
<th><strong>Score _____</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Include the organization’s Mission Statement, years of operation, and programs currently offered in Hillsborough County;</td>
<td>(8-12) – All points addressed; mission statement aligned; staff have appropriate qualifications to implement program and maintain fidelity to the model; validated equal opportunity; no concern about history.</td>
</tr>
<tr>
<td>2) Briefly describe the qualifications and background of the management staff;</td>
<td>(3-7) – Some points not addressed; all points addressed, but not well developed.</td>
</tr>
<tr>
<td>3) Briefly name formal designations, licensures or accreditations for your organization;</td>
<td>(0-2) – Poorly constructed; lacked too many details to ascertain organization capability of grant management according to Best Practice Standards.</td>
</tr>
<tr>
<td>4) Describe how the organization ensures equal opportunity to enroll clients/participants, employ staff, and recruit volunteers and Board members;</td>
<td></td>
</tr>
<tr>
<td>5) Describe any history of contract cancellation, filing of bankruptcy, lawsuits against the organization or its predecessor organization(s); and</td>
<td></td>
</tr>
<tr>
<td>6) Describe organization’s internal quality assurance procedures for managing grant funding by describing resources available in the following areas:</td>
<td></td>
</tr>
<tr>
<td>a) Contract compliance;</td>
<td></td>
</tr>
<tr>
<td>b) Meeting reporting deadlines; and</td>
<td></td>
</tr>
<tr>
<td>c) Fiscal accountability.</td>
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</table>

### 2.2.2 Organizational Capacity (maximum 12 points)

<table>
<thead>
<tr>
<th>Score</th>
<th><strong>Score _____</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Number of years working in Hillsborough County and primary target population served;</td>
<td>(8-12) – All points addressed; illustrated an understanding of Hillsborough County communities; have appropriate experience with Family Support Services; validated ability to respond effectively to crisis situations; effective plan to connect with each community and translate materials; ability establish and maintain partnerships.</td>
</tr>
<tr>
<td>2) Describe significant accomplishment(s) with serving in the prevention and early intervention system of care for children and their families;</td>
<td></td>
</tr>
<tr>
<td>3) Describe experience implementing best practices in Family Support Services;</td>
<td></td>
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</tbody>
</table>
### Appendix (#11) – Community Review Team (CRT) Scoring Criteria

<table>
<thead>
<tr>
<th></th>
<th>Score</th>
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<tbody>
<tr>
<td><strong>2.2.3 Financial Capability (maximum 12 points)</strong></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Describe personnel positions (include staff, volunteers, or contracted services) responsible for the financial management of the organization;</td>
</tr>
<tr>
<td>2</td>
<td>List current revenue sources, such as earned revenue, fees, development efforts, fundraising, endowment, other grants, membership fees, or social enterprise ventures;</td>
</tr>
<tr>
<td>3</td>
<td>Indicate current specific amount available in cash reserves. (Note: Children’s Board expects qualifying agencies to have up to (2) months of the estimated operating cost to pay for and invoice CBHC using a cost reimbursement model);</td>
</tr>
<tr>
<td>4</td>
<td>Summarize the organization’s sustainability planning efforts;</td>
</tr>
<tr>
<td>5</td>
<td>Briefly describe the financial procedures utilized and the accounting control system implemented to assure compliance with generally accepted accounting principles, laws, rules and regulations applicable to your organization; and</td>
</tr>
<tr>
<td>6</td>
<td>Indicate if the organization has written financial policies and procedures and briefly provide an example of how one is used in daily operations for managing grants.</td>
</tr>
<tr>
<td>7</td>
<td>Briefly provide an example of a grant managed by the organization in excess of $1,000,000.</td>
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</table>

<table>
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<tr>
<th></th>
<th>Score</th>
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</thead>
<tbody>
<tr>
<td><strong>Financial Capability (maximum 12 points)</strong></td>
<td>Score _____</td>
</tr>
<tr>
<td><strong>(8-12)</strong></td>
<td>All points addressed; staff qualified to manage funding; infrastructure to handle the investment financially and programmatically (2 months expenses in cash reserves); feasible sustainability; compliant with generally accepted accounting principles.</td>
</tr>
<tr>
<td><strong>(3-7)</strong></td>
<td>Some points not addressed; all points addressed, but not well developed.</td>
</tr>
<tr>
<td><strong>(0-2)</strong></td>
<td>Poorly constructed; lacked too many details to ascertain organization capability of managing the grant funds.</td>
</tr>
</tbody>
</table>

4) Describe any experience in responding to disaster and post-disaster/crisis situations;

5) Describe how linguistic and culturally competent work will be initiated and sustained;

6) Elaborate on how you will connect with each community and at the county level to deliver services that are responsive to residents’ needs;

7) Describe the organization’s ability to translate materials for the general public; and

8) Describe the organization’s capacity to establish and maintain partnerships with groups to include:
   
a) Consumer Advisory Councils;
   
b) Business Community;
   
c) Neighborhood Associations;
   
d) Government agencies and/or non-profit partners;
   
e) Local law enforcement and/or faith-based organizations; and
   
f) Volunteers.

(3-7) – Some points not addressed; all points addressed, but not well developed.

(0-2) – Poorly constructed; lacked too many details to ascertain organization ability to connect with the Hillsborough County communities.
<table>
<thead>
<tr>
<th>2.3 Board of Directors, Attachment (#3) (maximum 2 points)</th>
<th>Score _____</th>
</tr>
</thead>
</table>
| Use the provided template to list the names of the organization’s current Board Members, including member title and local affiliation or area of expertise. | (2) – All requirements met; financial, programmatic, and content experts on the Board.  
(1) – Some requirements not met; unclear if financial, programmatic, and content experts on the Board.  
(0) – No requirements completed correctly; attachment not provided. |

<table>
<thead>
<tr>
<th>2.3 CBFRC Role and Response during Crisis or Disaster, Attachment (#6) (maximum 7 points)</th>
<th>Score _____</th>
</tr>
</thead>
</table>
| Submit a plan with the role and response of the CBFRC during a time of crisis or disaster *(this is not your agency’s current Disaster Preparedness Plan)*. | (4-7) – All requirements met; plan for role and response was comprehensive.  
(1-3) – Some requirements not met; plan for role and response was lacking in detail.  
(0) – No requirements met; plan for role and response is insufficient. |

<table>
<thead>
<tr>
<th>2.3 Timeline of Activities, Attachment (#7) (maximum 3 points)</th>
<th>Score _____</th>
</tr>
</thead>
</table>
| Submit a one-page timeline of activities related to the hiring process to include training staff by October 1, 2020. | (3) – All requirements met; realistic.  
(1-2) – Some requirements not met; plan is unrealistic.  
(0) – No requirements completed correctly; attachment not provided. |

<table>
<thead>
<tr>
<th>2.3 Additional Attachments</th>
<th>No Score</th>
</tr>
</thead>
</table>
| Current Organizational Chart, Attachment (#4);  
Job Descriptions, Attachment (#5);  
Benefit Package, Attachment (#8); | *These Attachments do not have a score; however, comments will be recorded.* |

<table>
<thead>
<tr>
<th>Overall Opinion of Submission</th>
<th>No Score</th>
</tr>
</thead>
</table>
| Far Above Standards _______  
Meets Standards _______  
Far Below Standards _______ | Total (maximum 50 points) |

This rating form is subject to public records and is open for inspection and copying in accordance with the Chapter 119, Florida Statutes.