
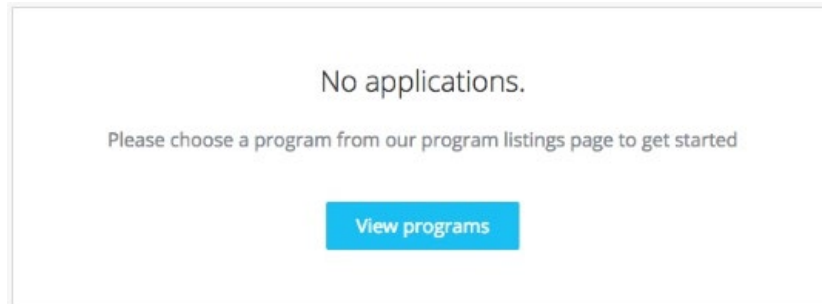


Children's Board of Hillsborough County
PRO 2026 – 03 Request for Proposals (RFP)
Leading Grant -Mentoring
Appendix (#1) - SurveyMonkey Apply Guide

SURVEYMONKEY APPLY GUIDE

- I. Google Chrome is the recommended internet browser.
 - A. Google Chrome may be downloaded at <https://www.google.com/chrome/>.
- II. The link to SurveyMonkey Apply is <https://cbhcgrants.smapply.org>.
- III. How to Register
 - A. Register on behalf of an organization
 1. Click **Register**;
 2. Complete the required information for who will be the Organization's Main Administrator;
 3. Click **Create Account**; and
 4. You will be asked to enter additional details about the Organization such as the Organization's Name, Address, and Contact Information.
 - B. Add members individually
 1. Login as an organization administrator;
 2. Click on **Manage Organization** in the top right corner;
 3. Click on **Members**;
 4. Click on **Add Member**;
 5. Enter the **First Name**, **Last Name**, and **Email Address** of the member;
 6. Select if they will have Administrative or Non-Administrative Access;
 - **Primary Administrator:** This is the organization member that initially creates the Organization and has full administrative control over the organization's members and applications. They will be able to transfer ownership of the organization, as well as edit and remove members of the organization at any time.
 - **Administrator:** These members have similar control over the organization's members and applications as the Primary Administrator. However, they will only be able to edit and remove non-administrative members, or inactive Administrators.
 - **Non-Administrative Members:** These members will be able to edit applications on behalf of the organization but will not have access to manage the organization's profile and members. They will also not be able to create or submit applications for an organization.
 7. *Optional:* If you have teams created, click to add them to a team;
 8. *Optional:* Notify the user that you are adding them to the organization; and

9. Click **Add**.
- IV. Completing the Application
- A. Locate the Application
 1. Click **View Programs**;



2. Click **MORE >** for the Application you wish to apply for; and
 3. Click **Apply**.
- B. Verify the email associated with the account first by clicking **Send Verification Link** and follow the instructions sent in the email;



- C. Respond to all Application Tasks
- All Attachments/templates can be found at the following link:
<https://www.childrensboard.org/budgeting/revenues-and-expenditures/funding-opportunities/>

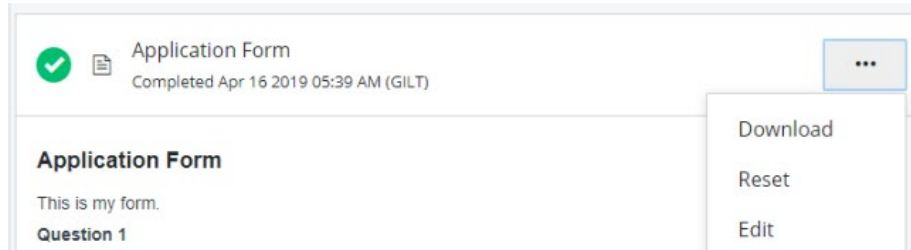
1. Cover Sheet (*SurveyMonkey Apply form*);
2. Signature Page (*Attachment 1 template SurveyMonkey Apply upload*);
3. Proposal Narrative (*SurveyMonkey Apply form*);
 - Please avoid using ALL CAPS.
4. Matrix/Work Plan (*Attachment 2 template provided; SurveyMonkey Apply upload*);
5. Budget (*Attachment 3 template provided; SurveyMonkey Apply upload*);
6. Implementation Plan (*Attachment 4 template provided; SurveyMonkey Apply upload*);
7. Board of Directors (*Attachment 5; template provided; SurveyMonkey Apply upload*);
8. Letters of Support (*Attachment 6; SurveyMonkey Apply upload*); and
9. Audit, Review, or Unaudited Annual Financial Statements (*Attachment 7 no template provided; SurveyMonkey Apply upload*).

- D. Mark each Task as Complete

MARK AS COMPLETE

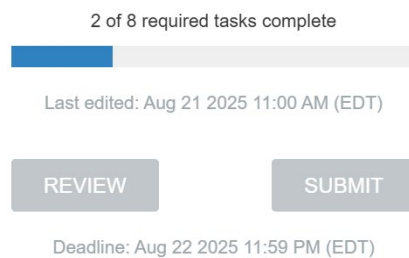
E. Editing a Completed Task

1. Enter your application;
2. Click on the task you wish to edit;
3. Click on the **More Options** icon in the top right corner of the task;



4. Click **Edit**;
 5. Click **Previous/ Next** to navigate between the pages and make your changes
 6. When done, navigate to the bottom of the page and press **Mark as Complete**.
- F. Submit the Application

1. Within the application to submit, select **Review & Submit**;



2. **Review** application materials;
3. Once you've reviewed all your completed tasks, you must click to **Submit** for the Application submission.
 - An email confirmation will be sent after submission.

1. RELATIVE GOVERNING BOARD POLICIES

1.1 FUNDING ELIGIBILITY

Proposers eligible for funding include not-for-profit corporations and governmental organizations legally operating in the state of Florida.

By statute Section 125.901, Florida Statutes, as it existed prior to October 1, 1990, the CBHC Board will not provide funding to programs or agencies that are under the exclusive jurisdiction of the School District of Hillsborough County. However, the Board may fund services through other organizations which are coordinated with and complement the services provided by the School District of Hillsborough County, and such services may be provided on sites owned or administered by the School District of Hillsborough County.

Funding may be provided for programs through faith-based or religious organizations if the program serves a secular purpose and if the principal or primary effect of the program is one that neither advances nor inhibits religion. Additionally, the program must not require worship or religious instruction activities as a condition of participation. All agencies funded by the Children's Board will be required to meet the same high level of professional standards and quality assurance measures.

1.2 SPECIAL FUNDING PARAMETERS

CBHC funding or resources shall not be used to replace funding for activities for which other local, state, or federal governmental agencies are obligated by statute, administrative rule, or local ordinance to support, except in the following instances:

- The Board will consider funding of health services (and other services of a preventive nature) provided that a determination is made by the CBHC Executive Director that these services cannot be funded through other agencies established to provide them. In those cases where the Board may fund such services, a plan to obtain funding from other appropriate sources at the earliest possible time will be formulated by the provider agency and approved by the Board.
- The Board will not fund academic and recreational activities unless a determination is made that these services cannot be funded through other agencies. In those cases where the Board may fund such services, a plan to obtain funding from other appropriate sources at the earliest possible time will be formulated by the provider agency and approved by the Board.
- The Board will not provide programmatic funding for real property acquisition or building construction.
- Agencies applying for funding or currently funded by the Children's Board may not reduce or redirect funding from another source either in anticipation of, or as a consequence of, receiving funding from the Children's Board without the prior approval of the Board. However, the Children's Board encourages funded programs

Children's Board of Hillsborough County
PRO 2026-03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#2) – Relative Governing Board Policies / Standard Conditions for Procurement

to develop other sources of funding from both public and private entities, including corporate support and individual contributions.

1.3 STAFF AFFILIATION WITH OTHER AGENCIES

No member of the Children's Board staff will serve as a Board member of any agency funded by the Children's Board. Staff may serve as non-voting consultants to such agencies for the purpose of providing technical assistance with the approval of the Executive Director of the Children's Board. CBHC staff already serving on governing bodies of agencies which make a proposal for funding to the Children's Board will take a leave of absence until a decision is made regarding the proposal. If funding is approved, the CBHC staff member concerned must resign membership on the governing authority. No CBHC staff member will accept any compensation from an organization funded by the Children's Board.

1.4 UNIVERSAL ACCESS TO CHILDREN'S BOARD FUNDED SERVICES AND RESOURCES

Services and resources funded by the Children's Board are available to all eligible families, as determined by the funded agency's admission criteria.

2. STANDARD CONDITIONS FOR PROCUREMENT

2.1 EQUAL OPPORTUNITY AND NONDISCRIMINATION

The CBHC encourages the participation of minority, faith-based, and grassroots organizations in all contracts. No person or legal entity will be excluded from participation in, denied the benefits of, or otherwise discriminated against in connection with the award and performance of any Children's Board procurement on the basis of race, color, religion, national origin, age, gender, sexual orientation, disability, or marital status.

The Grantee shall not discriminate in providing services on the basis of race, color, religion, national origin, age, gender, sexual orientation, disability, or marital status.

2.2 NO ORAL INTERPRETATIONS

Responses, interpretations, explanations, corrections, and changes in this Request for Proposals will only be made by written answers to Proposers' questions submitted prior to the deadline for such questions and/or by addendum. Interpretations, explanations, corrections, and changes of the Request for Proposals made in any other manner, or communicated orally by Children's Board staff will not be binding on the Children's Board and Proposers shall not rely upon them.

Children's Board of Hillsborough County
PRO 2026-03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#2) – Relative Governing Board Policies / Standard Conditions for Procurement

2.3 QUESTIONS FROM PROPOSERS AND CHILDREN'S BOARD'S RESPONSE

All responses to Proposers' questions about the Request for Proposals will be in writing. Questions and answers will be posted on the CBHC Website. Should any questions or responses require revisions to the Request for Proposals, such revisions will be by addendum only, and posted on CBHC Website.

2.4 ADDENDUM AND INCOMPLETE PROPOSALS

Proposers are responsible for complying with any addendum issued. FAILURE TO RESPOND TO ANY ITEM, INCLUDING ANY REQUESTED INFORMATION, OR FAILURE TO FOLLOW THIS PROCUREMENT DOCUMENT MAY RESULT IN THE SUBMISSION OF AN INCOMPLETE PROPOSAL AND MAY RESULT IN DISQUALIFICATION OF THE PROPOSAL FROM FURTHER CONSIDERATION.

2.5 RIGHT TO SEEK AND CONSIDER CLARIFYING INFORMATION

The Children's Board may seek clarifying information regarding any Proposal. Such clarifying information shall be provided by the Proposer in writing.

2.6 REJECTION OF PROPOSALS OR PROPOSERS

The Children's Board reserves the right to reject any Proposals with or without cause, to waive technicalities or informalities, and/or to accept a Proposal which best serves the interests of the Children's Board as described in this procurement document.

Any Proposal determined to be non-responsive to any specification or requirement of this RFP document, including instructions governing submissions of Proposals, may be disqualified without evaluation.

Proposers who violate the provisions of this procurement document may be rejected from the selection process.

2.7 COST REIMBURSEMENT PAYMENTS

Grantees will be paid on a cost reimbursement basis. This will require applying organizations to have the financial resources with evidence of two (2) months of available reserves to pay operating expenses of the program prior to receiving payment from CBHC.

2.8 CHILDREN'S BOARD'S CONTRACT

By submitting a Proposal, the Proposer agrees if an award is offered, the agency will perform the Services to contract specifications. The Proposer will, upon such selection, execute a standard CBHC contract for program Services. Execution of the contract will be contingent on availability of funds and Board approval.

**Children's Board of Hillsborough County
PRO 2026-03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#2) – Relative Governing Board Policies / Standard Conditions for Procurement**

2.9 AWARD OF CONTRACT

The contract for Services will be awarded to the organization submitting a Proposal that is determined to be best aligned with the desired outcomes of the Children's Board. No contract shall exist between the Children's Board and the selected organization until the written contract is signed by the Children's Board and the selected organization. The Children's Board reserves the right to negotiate the revision of the Scope of Services with the successful Proposer(s) as deemed necessary to meet the desired outcomes. The Children's Board reserves the right to award different elements or components to different Proposers as determined to meet the intent of the RFP. Awards are not based solely on scores from the Community Review Team. The Children's Board also considers its priority populations, available funds, and/or local data driven community needs for families and their young children.

2.10 PROHIBITIONS ON PROPOSERS WHO ARE FORMER CBHC EMPLOYEES AND BOARD MEMBERS

For a period of two (2) years from the date a Children's Board employee or Board member ceases his/her employment or Board member duties with CBHC, the CBHC will not award a consulting or services contract to that individual.

EFFECTIVE UPON AWARD
CHILDREN'S BOARD OF HILLSBOROUGH COUNTY
ATTACHMENT 3 – FY 2025-2026
GENERAL TERMS AND CONDITIONS
STANDARD CONTRACT - COST REIMBURSEMENT

1. Incorporation of Agreement Documents: The Agreement between the CHILDREN'S BOARD and the PROVIDER consists of the following documents which are incorporated herein by reference:

- a) "Standard Agreement Cover Sheet"
- b) "Standard Agreement Definitions"
- c) Attachment (1) "Standard Agreement Scope of Service, Service and Performance Objectives"
- d) Attachment (2) "Budget"
- e) Attachment (3) these "CBHC General Terms and Conditions"
- f) Attachment (4) "Sub-contractors"
- g) Attachment (4a) "Roles and Responsibilities of Lead Agencies and Sub-Contracted Agencies" (if applicable)
- h) Attachment (5) "Addresses (Contact List)"
- i) Attachment (6) "List of Required Demographic Data"
- j) Attachment (7) "E-Verify Declaration"
- k) Attachment (8) "No Coercion for Labor or Services Declaration"
- l) Attachment (9) "Foreign Country of Concern Declaration"
- m) Attachment (10) "Matrix/Work Plan"

2. Services: The PROVIDER will provide the services described in Attachment (1), "Standard Agreement Scope of Service" (hereafter "Services") for the residents of those working or residing in Hillsborough County.

3. Matrix: A Work Plan (hereafter "Matrix") has been approved by the CHILDREN'S BOARD for this Agreement which is contained in Attachment 10 – "Matrix/Work Plan". The Matrix describes the program and evaluation design including activities, responsible parties, outcomes, indicators, and data sources, and time of measurement and data collection necessary. PROVIDER agrees to strictly comply with the terms and conditions contained in the Matrix.

4. Service Area: PROVIDER will maintain service sites that are accessible and convenient to the participants in the area indicated on the contract cover sheet and standard scope of service. The PROVIDER must submit a prior written request before changing any service area or site(s).

Outside-Area Emergency Services - PROVIDER shall provide all services in Hillsborough County based on Cover Sheet and Scope unless PROVIDER submits and the CHILDREN'S BOARD accepts an Amendment or Matrix Modification.

5. Sub-Contractors: PROVIDER may not delegate its obligations under this Agreement to another party or sub-contract any of the work unless the PROVIDER obtains the prior written approval of the CHILDREN'S BOARD and completes Attachment (4) "Sub-contractors" and Attachment (4a) "Roles and Responsibilities of Lead Agencies and Sub-Contracted Agencies".

All sub-contracts will incorporate and be subject to the terms and conditions of this Agreement. PROVIDER shall submit a signed copy of all sub-contractor agreement(s) within thirty (30) days of execution of the

Agreement with the CHILDREN'S BOARD and all sub-contract agreements must be in place and signed by PROVIDER and sub-contractor prior to services being rendered by sub-contractor.

All such sub-contract agreements must include a budget as Attachment 2 "Budget" and a description of contract deliverables from the Matrix Attachment 10. Sub-Contractors shall submit reimbursement requests in compliance with the Fiscal Reporting Requirements Handbook.

6. Term: PROVIDER will perform Services during the period designated in the "Standard Agreement Cover Sheet," paragraph (6), Term. This Agreement will terminate at midnight on the last day of the term, unless extended by the CHILDREN'S BOARD.

7. Cost Reimbursement: General: During the term of this Agreement, funds described in Attachment (2) "Budget" will be used by PROVIDER solely for providing the Services described in Attachment (1) "Standard Contract Scope of Service, Service and Performance Objectives". Misspent funds are funds received by the PROVIDER from the CHILDREN'S BOARD that are not spent in accordance with Attachment (2) "Budget" or the terms of this Agreement. Misspent funds are subject to Recovery or set off to the CHILDREN'S BOARD.

- a) Expenditures not in accordance with the Attachment (2) "Budget" will constitute a breach of this Agreement.
- b) The PROVIDER will promptly return to the CHILDREN'S BOARD any unearned funds. Unearned funds are funds paid to the PROVIDER that are not due to the PROVIDER under the attached budget or the terms of this Agreement.
- c) In addition to any other remedy, the CHILDREN'S BOARD may set off any unearned or misspent funds against any other funds due PROVIDER.

8. Payment: To receive payment, PROVIDER must perform the Services pursuant to this Agreement and provide proof of service delivery.

So long as PROVIDER is in full compliance with the Agreement, the CHILDREN'S BOARD will reimburse the PROVIDER for services provided and expenditures incurred and paid. Items purchased and Services provided must be received or performed during the Term. Reimbursement will be made according to the line-item budget described in Attachment (2), "Budget". The final reimbursement form must be submitted to the CHILDREN'S BOARD no later than forty-five (45) days of the termination of this Agreement.

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

- The CHILDREN'S BOARD Reimbursement Request Forms; and
- Participant data collection and other reports or information required by Attachment (1), "Standard Scope of Services".

9. Critical Incidents Requiring Immediate Notification: No later than one business day of PROVIDER knowing of a Critical Incident (defined below), related to services funded in whole or part by the CHILDREN'S BOARD, 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 request. All e-mail communications made or received by the CHILDREN'S BOARD are subject to the Florida Public Records Law, Chapter (119), Florida Statutes.

PROVIDER shall directly report required matters 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 Florida Abuse Hotline.

The following critical incidents must be reported to the CHILDREN'S BOARD if it involves any of the following identified persons (collectively referred to in this section as "individual(s)") related to services funded in whole or part by the CHILDREN'S BOARD.

- i. A Participant means any person receiving any Service funded in whole or part by this Agreement.
- ii. An Employee means an individual employed by or volunteering for the PROVIDER or sub-contractor.
- iii. Board member means a person actively serving on the Board of Directors of a PROVIDER or sub-contractor.

A CRITICAL INCIDENT is any:

- a. Abduction—An incident in which an individual who does not have care and custody of another and is wrongfully taken.
- b. Abuse or Neglect – Reasonable cause to suspect that a Participant has been harmed or is believed to be threatened with harm.
- c. Arrest – an individual is arrested or accused of a potentially disqualifying offense under level (2) background screening requirements as defined in Chapter (435), Florida Statutes.
- d. Death – The death of any individual.
- e. Illness– A serious illness of a Participant that is life-threatening, contagious or the result of apparent abuse or neglect.
- f. Physical or Sexual Battery – Any credible allegation involving physical or sexual battery of a Participant.
- g. Suicide or suicide attempt.
- h. Law Enforcement involvement.
- i. An adverse media event in which the CHILDREN'S BOARD may be reasonably expected to provide a response.
- j. Class One Violations issued by the Department of Children and Families for Child Care Licensing.
- k. Other Serious Incidents – Any action, incident, misconduct, or malfeasance involving individual(s) providing or receiving Services under this Agreement.

10. Other Events Requiring Notification: The PROVIDER will notify the CHILDREN'S BOARD in writing as soon as reasonably possible if any of the following occurs:

- (1) Services are not initiated on the date of commencement described in the "Agreement", or the PROVIDER knows that the Services will not continue throughout the Term of the Agreement;
- (2) the scope of a CHILDREN'S BOARD funded position, vendor or sub-contractor ceases or materially changes;
- (3) funds from third party sources that were budgeted to provide the Services are not available in the amounts or at the times planned;
- (4) the PROVIDER obtains third party funds to provide the Services, in addition to those which were budgeted, or the PROVIDER becomes aware of additional third party funds that are available to provide the Services;
- (5) the PROVIDER fails to provide the scope or level of Services in this Agreement;

- (6) individuals providing the Services are terminated, reassigned, or resign;
- (7) the Services are 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;
- (8) a written complaint by any person receiving Services funded in whole or in part by this Agreement, written notification to the CHILDREN'S BOARD must be given within five (5) days after PROVIDER'S receipt of the complaint;
- (10) A change in control evidenced by a majority of the PROVIDER'S Governing Board turning over or a change in the PROVIDER'S Executive Director (or other similar senior management position);.
- (11) any change to information listed on Attachment (5) "Addresses" (Contact List): and;
- (12) any PROVIDER or subcontractor is a victim of a cyber-attack, data or security breach, or a disruption to data backup procedures/systems.

After notice, the CHILDREN'S BOARD may conduct an investigation and PROVIDER shall cooperate in the investigation, make its employees and subcontractors available for interview and turn over documents to assist the CHILDREN'S BOARD in completing its investigation.

11. Modifications: This Agreement may only be amended or modified in writing. The PROVIDER may not rely on any verbal directive of any employee of the CHILDREN'S BOARD to amend or modify any part of this Agreement. No course of conduct by employees of the CHILDREN'S BOARD will act as a waiver of any part of this Agreement.

12. 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, communications or reports on internal control and any reports on compliance with laws, rules or 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 in the 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 PROVIDER's financial statements. 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). All contracts with a term of less than six (6) months do not require the submission of an Audit.

- a. 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.
- b. Compliance Audit Performed by a CPA Firm Retained by the CHILDREN'S BOARD: In addition to the required financial audit, the CHILDREN'S BOARD, at its discretion, may select and retain a CPA firm to conduct a compliance audit or other accounting review of the program

funded under this Agreement. PROVIDER shall cooperate with the auditor and make its personnel and records available to the Auditor for inspection and copying.

- c. 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 more than twenty (20%) percent 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 set off funds due under this Agreement as a means to recover the cost of the audit and any misspent funds.
- d. Survival of Paragraph: This paragraph will survive the termination of this Agreement. PROVIDER shall keep and maintain all business records for a period of five (5) years after receipt of final payment from the CHILDREN'S BOARD.
- e. 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, audit requirements, will be determined by the CHILDREN'S BOARD.

13. Budget Adjustments: Budget Adjustments Allowed Without Prior Approval (Notification): Subject to paragraph (2) Matrix/Work Plan Modifications below, PROVIDER is authorized to adjust the budget as follows without the prior approval of the CHILDREN'S BOARD. Subtotal line items may be increased or decreased up to \$1,000 or 15%, whichever is greater, so long as the total budget amount is not increased.

Budget Adjustments Requiring Prior Approval (Modification)- General Conditions: The PROVIDER may, at least ninety (90) days prior to the end of the agreement, request to make budget adjustments in excess of the limits described above in accordance with this Agreement and the CHILDREN'S BOARD'S Fiscal Handbook.

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

- (1) The representatives of the CHILDREN'S BOARD and PROVIDER who are authorized to modify the Matrix 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.
- (2) By written agreement of the Matrix Representatives, Columns 1-3 and 5-7 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 without a contract amendment.
- (3) The Matrix cannot conflict, in whole or in part, with these General Terms and Conditions or the Budget, but in the event of a conflict, the provisions of these General Terms and Conditions and the Budget shall take precedence, as applicable.

15. Program Monitoring: The PROVIDER will submit progress reports and other information in such formats and at such times as may be requested by the CHILDREN'S BOARD, 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 laws rules and regulations, including, but not limited to, Chapters (39) and (415), Florida Statutes.

The PROVIDER agrees to cooperate in all activities related to site visits and other on-site monitoring

(including, but not limited to: access to sites, participants, staff, fiscal and participants 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.

16. Program Monitoring Reports: All reports or data narratives will contain information required by the CHILDREN'S BOARD. PROVIDER and CHILDREN'S BOARD shall communicate openly, follow an established schedule for reporting, and share information in the format as may be requested by the CHILDREN'S BOARD.

Program Monitoring Reports are part of planning level decisions of the CHILDREN'S BOARD as to how and where to allocate resources. Program Monitoring Reports are not used for operational level decisions of the CHILDREN'S BOARD as those categories relate to sovereign immunity.

17. Performance: In the event of default, noncompliance, 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 place PROVIDER on a Provider Improvement Plan, suspend payment or impose any other lawful remedy up to and including termination of this Agreement.

18. Termination: This Agreement may be terminated by the CHILDREN'S BOARD by giving seven (7) days' prior written notice 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.

Any termination notice will be delivered by certified mail, return receipt requested; or in person to the offices of the PROVIDER. 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. The term "budgeted rates" in this paragraph means those allocations and amounts contained in the Attachment (2) "Budget", or the most recent amended Budget approved in writing by the CHILDREN'S BOARD. All rights and remedies of the CHILDREN'S BOARD to enforce this Agreement will survive termination of this Agreement.

19. 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, 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.

20. 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 and reputable 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 Bodily Injury, Personal Injury Liability and Property Damage under this Agreement which shall be considered primary insurance, 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
○ Aggregate	\$2,000,000
○ Products & Completed Operations	\$1,000,000
○ Damage to Rented Premises	\$50,000

- 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

- c. Workers' Compensation Insurance in statutory amounts.
- d. Subrogation. PROVIDER shall obtain a waiver from its insurance carrier as to its rights of subrogation.

The PROVIDER will submit to the CHILDREN'S BOARD a certificate of insurance upon execution of this Agreement which describes the insurance maintained by the PROVIDER.

- PROVIDER agrees to obtain certificate of insurance upon the effective date of this agreement from PROVIDER'S subcontractors 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.

- 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.

21. Indemnification: The PROVIDER shall indemnify and hold harmless the CHILDREN'S BOARD, its agents, officers, directors, attorneys and insurers 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 arising out of or related to this Agreement, including the acts or omissions of PROVIDER'S subcontractors, if any. This section shall survive termination of 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.

22. 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 any) 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 payment of attorney's fees and costs of litigation, but PROVIDER remains subject to payment of attorney's fees and costs if it is determined in such action or proceeding (including any appeal) that PROVIDER does have the legal authority to contractually agree to pay attorney's fees and costs; (7) the requirements of the provisions related to Conflict of Interest, apply only to the program funded under this Agreement; and (8) The provisions related 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 in which a UNIVERSITY PROVIDER develops, 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.

23. 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 the qualifications stated in the application and any approved modifications. In compliance with s. 787.06(13), Florida Statutes, the PROVIDER will execute Attachment (8) "No Coercion for Labor or Services Declaration" as defined in s. 787.06(2)(a), Florida Statutes.

In compliance with Florida Statute s. 435, PROVIDER will maintain, update and enforce a policy, and related procedure, regarding mandatory Level 2 background screenings for employees, volunteers, sub-contractors and vendors related to services funded in whole or part by the CHILDREN'S BOARD. Background screening requirements must be completed and on file with provider agency prior to services being rendered. To ensure compliance with background screenings requirements, refer to <https://www.myflfamilies.com>.

In compliance with Florida Statute s. 448.095 E-VERIFY REQUIREMENT PROVIDER will execute Attachment (7) "E-Verify Declaration" as defined in s. 448.095- Florida Statutes: attesting that PROVIDER will verify the work authorization status of newly hired employees and will require subcontractors to submit an declaration to PROVIDER that they are in compliance with the E-Verify requirement.

24. 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 subcontractor, individual or company with whom the PROVIDER or any individual member thereof has an apparent or actual conflict of interest.

25. 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, gender identity, or marital status, or any other basis prohibited by law, discriminate in any form or manner against PROVIDER'S participants, applicants for Services, or employees or applicants for employment. Within ten (10) business days of PROVIDER receiving notice that a discrimination complaint has been filed against PROVIDER or any of its employees or sub-contractors, PROVIDER will notify the CHILDREN'S BOARD that a discrimination complaint or notice has been filed. The PROVIDER asserts that it has a procedure for handling discrimination complaints and has designated a staff person to receive such complaints.

26. Drug-Free Workplace: PROVIDER will comply with the Drug-free Workplace Act, Section 440.101, Florida Statutes.

27. Other Financial Support: The CHILDREN'S BOARD'S funds may not be used for expenditures for which funding is available from other sources, and the Children's Board reserves the right to set off or reduce funding to Provider if funding is available from another source. 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 the use of its funds as a financial match for securing funds from other sources. All PROVIDERS should strive to maintain financial sustainability through funding diversification from sources other than the CHILDREN'S BOARD.

28. 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 the state of Florida and serving the residents of Hillsborough County. In compliance with s. 287.138(4)(a), the PROVIDER will execute Attachment (9) "Foreign Country of Concern Declaration", attesting that it is not owned by the government of a foreign country of concern as identified in s. 287.138(1)(c), Florida Statutes; does not have a controlling interest in the PROVIDER and is not organized under the laws of, or has its principal place of business in a foreign country of concern.

29. 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 participant for any purpose not required by federal, state, or local laws and related regulations, except by written consent of the participant, or his/her responsible parent or guardian where authorized by law. In addition, the Provider will have established policy and written procedures to protect hard copy and electronic program and fiscal records against loss or disclosure to unauthorized individuals or agencies.

30. 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 and PROVIDER grants CHILDREN'S BOARD a non-exclusive royalty free license to use such Intellectual Property. However, that to the extent that such Intellectual Property is confidential pursuant to law, rule or regulation, including, but not limited to, Chapters (39) and (415), Florida Statutes, said Intellectual Property will not be disclosed, or improperly used in any manner whatsoever by the CHILDREN'S BOARD. If the Intellectual Property is solely created by PROVIDER, 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, PROVIDER shall assign such Intellectual Property to CHILDREN'S BOARD for no additional consideration and the CHILDREN'S BOARD may obtain in its name and may own all copyrights, trademarks, or patents on or for Intellectual Property. If the CHILDREN'S BOARD owns the 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, other than to perform the services described in this Agreement.

31. Publicizing of CHILDREN'S BOARD Support: The PROVIDER agrees to acknowledge the CHILDREN'S BOARD support on all program materials, either electronic or print, 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 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 request that media acknowledge the financial support received from the CHILDREN'S BOARD (e.g., radio, television, online publications or programs, or newspapers.) PROVIDER agrees to provide information about the CHILDREN'S BOARD each year to its employees and governing Board of Directors at regularly scheduled meetings. PROVIDER agrees to notify the CHILDREN'S BOARD of all outreach activities related to the services provided in this agreement in advance of the event.

32. Participation in 2-1-1 Human Services Data Base: The PROVIDER agrees to participate in the 2-1-1 human services database by listing and updating its agency and program information and profile with www.211atyourfingertips.org during the term of this Agreement.

33. Continuity of Operations and Emergency Management Services: The PROVIDER must have an Emergency Services Work Plan. The PROVIDER will submit to the CHILDREN'S BOARD a 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 to ensure that PROVIDER's property and services are able to respond and recover from any natural and/or man-made disaster/event.

- a. 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 locations designated by the CHILDREN'S BOARD. 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. The Emergency Management Services may be performed separately, or in coordination with, or under the direction of other government agencies as designated by the CHILDREN'S BOARD. The PROVIDER shall assist in Emergency Management Services to the best of its ability.
- b. The CHILDREN'S BOARD may continue to pay the PROVIDER for up to six (6) months after a declaration of emergency to assist the PROVIDER in recovering its financial and institutional capacity that may have been diminished in performing Emergency Management Services.
- c. The Emergency Services Work Plan and any amendment may be in writing or may be temporarily implemented by oral agreement recorded in any form of audio recording with the consent of all parties.
- d. 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.

34. 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 suit, mediation, trial court, appellate court, bankruptcy court or before any administrative body (including arbitration); (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 expenses, 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 proceedings. Nothing in this paragraph will be construed as requiring arbitration. This provision shall survive termination of this Agreement.

35. 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, sub-contractor, 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 Florida State Statute s. 287.017, for CATEGORY TWO for a period of thirty-six (36) months from the date of being placed on the convicted vendor list.

36. 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.

37. Governing Laws: This Agreement will be governed by the applicable laws, rules, and regulations of the State of Florida, Hillsborough County (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.

38. Integration: This Agreement and the attachments referenced above contain the entire agreement between the parties. There are no other oral agreements which are inconsistent with the terms and conditions of this Agreement.

END OF GENERAL TERMS AND CONDITIONS

CHILDREN'S BOARD OF HILLSBOROUGH COUNTY
2025-2026 List of Required Demographic Data

(Subject to change)

For Children and Families as participants served	Specification
First Name	
Last Name	
Children's Board ID (PERMID)	Automatically generated by data system
Participant Type	Adult; Minor Child; Teen Parent; Professional
Date of Birth	
Gender	Female; Male; Refused; Not Available
Ethnicity	Hispanic or Latino; Not Hispanic or Latino; Refused; Not Available
Race	White; Black or African American; American Indian or Alaska Native; Asian; Native Hawaiian or Other Pacific Islander; Two or More Races; Refused; Not Available
Address	
City	
State	
Zip Code	
Child Grade	Not yet in school; Pre-Kindergarten; Kindergarten; 1st Grade; 2nd Grade; 3rd Grade; 4th Grade; 5th Grade; 6th Grade; 7th Grade; 8th Grade; 9th Grade; 10th Grade; 11th Grade; 12th Grade; Does Not Apply; Not Available
Child Free Lunch Eligible	Yes; No; Does Not Apply; Not Available
Number of Adults in Home	
Number of Children in Home	
Household Structure	Male (Single) Head of Household; Female (Single) Head of Household; Other-Relative/ Kinship Care (Single) Head of Household; Dual 2 Parent Household; Dual 2 Other- Relatives/ Kinship Care Household; Other; Refused; Not Available
Highest Education Level in Household	Some or no high school; High school graduate or GED; Technical Certificate; Some college; Associates Degree; Bachelor's Degree; Advanced Degree; Refused; Not Available
ASO FamilyID (if applicable)	
Program Start Date	
Program End Date	
Closure Reason	Completed service; No longer eligible; Voluntary withdrawal; Moved; Child removed from home; Incarceration; Death
If Re-Enrolled, Program Start Date	
If Re-Enrolled, Program End Date	
If Re-Enrolled, Closure Reason	Completed service; No longer eligible; Voluntary withdrawal; Moved; Child removed from home; Incarceration; Death
Agency name	Automatically generated by data system
Program name	Automatically generated by data system

Children's Board of Hillsborough County
 PRO 2026-03 Request for Proposals (RFP)
 Leading Grant-Mentoring
 Appendix (#5) – Matrix/Workplan Instructions

One Page Per Outcome or less

Instructions:			
Objective (What)	Proposed Program Activities (How)	Expected Outcome (Why)	Data Source (Where)
Total number of children will receive what and where.	List the titles of services offered to meet the outcome and include with frequency and duration.	Copy from RFP Section 2.2.1 and include the number of children that will complete services and be measured for each outcome.	Name of the measurement tool to be used and/or where data collected is stored.
Example ONLY:		Example ONLY	
<i>Provide 200 children with mentoring services at James, Potter, Foster, and/or Burney elementary schools</i>	<i>Specify:</i> <i>HCPS Framework Tier and Touchpoints</i> <i>Time frequency of each visit</i> <i>Group Size</i> <i>List other service(s) offered to children to meet the outcome</i>	<i>80% of 200 Children with Improved Progress Towards Academic Success.</i>	<i>Where are you getting data from to show a child met the outcome.</i>

FY 2025 - 2026 BUDGET INSTRUCTIONS FOR NEW PROGRAM FUNDING

NEW PROGRAM FUNDING BUDGET SUMMARY

The New Program Funding Budget provides a summary of the total projected new expenditures for the delivery of services described in the proposal. All costs included in the budget should be necessary based on the program model contributing to the outcomes or deliverables.

The Excel budget form consists of four (4) tabs, the budget summary, salary detail, and the budget narrative for both year 1 and 2.

The New Program Funding Budget should contain the specific revenues and expenditures for the program to be funded by the Children's Board of Hillsborough County (CBHC) for the initial contract period through the end of the fiscal year (September 30) and the estimated annual revenues and expenditures for the next full fiscal year (October 1 to September 30). This includes the total program budget for the entire program including expenses reimbursed by other revenue sources.

In the upper left corner, complete the cells highlighted in green: agency, program name, contract period, and total agency budget. The total agency budget amount is your organization-wide budget for the current fiscal year.

Column (1) is the Total Program Budget for the initial contract period through September 30; Column (2) includes the CBHC portion of the budget for the initial contract period; Column (3) is the annual Total Program Budget for the next full fiscal year (October 1 to September 30); Column (4) is the CBHC portion of the budget for the next fiscal year.

Special Notes:

If only one year of funding is being requested, only fill out columns one and two.

Budget figures should be rounded to the nearest dollar.

The figures on the New Funding Budget Summary tab will be linked to the figures on the Budget Narrative Yr 1 and Yr 2 tabs.

Please do not make any material changes to the form, such as adding or deleting budget categories.

BUDGET NARRATIVE

Each budget item for which funds are being requested 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.

Provide a budget narrative for both year one and year two. Indicate if expenditures budgeted in year one are startup, one-time expenditures. If the year two amount is the same as year one, state that in the narrative. If the year two amount is different, provide the detail of how the year two amount was calculated.

Do not use acronyms in the narrative.

REVENUES

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:

The amounts requested from the Children's Board for both the first and second year on the New Funding Budget Summary tab will be linked to the figures on the Budget Narrative Yr 1 and Yr 2 tabs. Do not include any ASO allocation in these amounts.

Other Funding Sources:

Name each source of revenue for this program on a separate line by individual funder or type of revenue. This includes other grantors, contributions, fundraising events, in-kind revenue sources, 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*
- *Indicate if the revenue source is time-limited.*

Special Note: *Evidence of a required match from the primary funder must be provided to the assigned contract/program manager if CBHC funding is considered a "match" contract.*

If the agency provides cash to balance the budget, include this revenue source on a separate line.

List in-kind revenue (no cash contributed) 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). List each source of in-kind revenue separately and describe what type of in-kind support is provided.

Children's Board Administrative Services Organization (ASO):

Leave this line blank at time of application. If the proposed program is eligible and awarded, this amount will be finalized during contract negotiations.

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 being proposed. **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. Please be sure to review the list of unallowable costs at the end of these instructions.**

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, describe 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 tab.

Ensure that the figures on the Salary Detail tab match those on the Budget Narrative tab.

The amount included should only be the percentage of the Full Time Equivalent (FTE's) providing direct services for the program in order to successfully provide the proposed services.

Examples of administrative positions not to be included in the salary detail 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 the oversight position funded

to manage the program (i.e. Director, Manager, and Coordinator).

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/zip code(s). If a position regularly maintains a caseload of any kind, indicate what the full capacity of the caseload would typically be at any given time.

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 requested total amount of CBHC total expenditures is less than \$600,000, an Executive Director (ED) position may be allocated for direct services performed 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.

Salary Detail Tab:

Enter the information requested in each column for each position. Take the time to review each column and verify the information is correct based on what the position does for the agency and program and how much CBHC is funding each position.

1. **Name and Position Title** - The name of the individual occupying the position, if known, and the title of the position. If positions will be working in a specific region, list the region(s) name and zip code(s) in which the position will be working in the narrative. List if the position is bilingual.
2. **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).
3. **GROSS ANNUAL SALARY** - Total annualized expense to the agency for the position.
4. **% OF TIME IN PROGRAM** - Percentage of time spent **directly on program activities** regardless of funding source (**total program expense**).
5. **FIRST YEAR Total Program Salary** - Total salary expense in the program being requested through the end of the first year (September 30). This amount should be a pro-rated amount of the gross annual salary based on the number of months the position will be filled for the first year. The pro-rated amount is multiplied by the percentage of time in program to determine the total program

salary.

6. **FIRST YEAR CBHC Amount** – The total salary expense in the program that is charged to the CBHC in the first year. The amount cannot exceed the first year Total Program Salary.
7. **SECOND YEAR TOTAL PROGRAM SALARY** - Total salary projected to be allocated to the program in the second year. This is calculated by multiplying the gross annual salary by the percentage of time in program.
8. **SECOND YEAR CBHC AMOUNT** - Total salary expense projected to be charged to the CBHC in the second year. The amount cannot exceed the second year 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. The Initial contract year will be from April 1 to September 30. $\$26,000 \times 50\% = \$13,000 \times (6 \text{ months}/12 \text{ months}) = \$6,500$.

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
Name and Position Title	FTE	Gross Annual Salary	% of Time in Program	First Year Total Program Salary	First Year CBHC Amount	Second Year Total Program Salary	Second Year CBHC Amount
Name: Tom Jones							
Position: Case Manager	0.75	26,000	50%	6,500	3,250	13,000	6,500

Please Note:

- *If the program will have more than ten employees, additional rows can be unhidden on the salary detail budget tab by highlighting rows 35 through 117 on the spreadsheet, right-clicking, and selecting "unhide."*

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, and long-term and short-term disability. 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 amounts for each type of benefit.**

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 those sub-contractor partner agencies that contribute to the outcomes for the contract. More information regarding sub-contractor partners may be found in the funding release document. Attach a full budget summary, salary detail, and budget narrative for each sub-contractor partner.

Other Vendor 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.

In most cases, expenses should be charged to the contract using the actual cost directly related to each program. If expenses such as occupancy costs or 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. If occupancy or insurance costs are allocated, either building square footage or total FTEs are typically used as the allocation method. If the total FTEs method is used, any square footage (space) that is used for non-CBHC program purposes (such as residential or other administrative) should be removed from the calculation used to determine the allocation.

Expenses other than those listed below are unallowable.

Building Lease/Rent: 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 narrative that clearly describes the methodology for how the costs were calculated. Shared touch down space may be budgeted.

Example Narrative:

- 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.

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 used 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. The allocation should be based on square footage used and should be described in the narrative.

Please Note:

- ***A full allocation plan including the specific items, amounts and method of allocation must be provided.***
- ***Back-up documentation detailing the expenses included and how the allocation was made to the program must be provided 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.

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, install a system or the cost of security personnel.

Telephone: Land lines: Include the cost for office phone system services utilized by

program staff. If the amount for land lines includes an allocation of a portion of the total agency cost, the total FTEs method should be used to determine the allocation. *Cell phones:* The monthly cost for voice service for cell phones may be included for direct service staff at a maximum of \$35 per month per FTE. List the position(s) being provided with the allowance. If an FTE is less than 100% in the program, prorate the monthly allowance based on the FTE percentage.

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. The total FTEs method should be used to determine the allocation. 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.

Other Operating Costs:

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 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 reimburse 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 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.

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.

Insurance: Include the cost for liability, vehicle, and property insurance in this line. Describe the total insurance cost for the agency and how the cost for the program was allocated. If property insurance is allocated, the square footage method must be used. Allocate all other insurance expense by FTEs.

Postage: Explain how the amount was calculated.

Printing & Copying: Include outside printing cost and per copy copying cost. Describe specific items to be printed in the narrative if known.

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

Outreach: Include expenses for 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 and used by the program only. 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.

Background Screening (volunteers): Include costs for level II background screenings 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: Include expense for data systems accessed by participants and used specifically to generate information for reporting on CBHC outcomes and demographic information. Include expense for electronic health or client (participant) record systems that interface with and are used with the client. Support for a computer lab or technology for participants' use may also be

included. 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: Include the cost of 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 reimburse a maximum of \$1,600 per computer including accessories (keyboard, mouse, monitor, docking station, etc.). For software purchases, include the cost of the physical disk or license purchased. If a particular software is sold on a "per machine" basis only, include the cost of each physical disk or license purchased. Any software purchased must be necessary for program service delivery.

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

Educational/Curriculum Supplies: Include the cost of supplies that staff or participants use during program activities and are retained by the program.

Evaluation Supplies: Include the cost of non-virtual measurement tools or surveys purchased to evaluate Matrix/Workplan activities or participants.

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: Items given to the client (to keep or consume) that support program outcomes. Examples are educational toys, written educational materials, snacks, school supplies, safety products, and basic needs items not covered through the ASO.

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).

Transportation for Clients: Include the cost for vehicle rental, bus passes, cab vouchers, and/or any other expense to transport clients to services or events. If an agency-owned vehicle is used, allowable expenses include the costs for a driver and fuel for the vehicle. Costs may be included for services provided by Uber Health (subject to CBHC approval).

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: Leave this line blank at time of application.

Administrative/Indirect Cost:

This is an allowance (allocation) meant to account for the administrative costs associated with operating the program (if applicable), which are not directly attributable to direct program services. Provide a brief narrative that identifies some of the agency administrative costs that the allowance will help offset.

Examples of expenditures considered to be administrative are executive staff, fund development, fundraising, 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 finance staff.

The administrative/indirect allocation requested from CBHC cannot exceed 12% (agency budget greater than \$750,000) or 20% (agency budget less than \$750,000) of the total direct expenditures.

For lead agencies with subcontractors, the administrative/indirect allocation for the lead agency is limited to 12% of the first \$25,000 of each subcontract (maximum of \$3,000 for each subcontractor partner). Each subcontractor is allowed 12% (or 20%) of the direct expenditures in its budget.

Lead agency calculation example when a subcontractor's budget is over \$25,000 (assumes lead agency qualifies for 12% admin rate):

Total direct expenses	\$1,200,000	
Less two subcontracts	<u>(800,000)</u>	(400,000 x 2)
Net direct expenses	400,000	
Admin/indirect from CBHC	48,000	(12% x 400,000 net direct expense)
Plus allowance for subcontracts	<u>6,000</u>	(12% on first 25,000 or 3,000 each)
Total admin/indirect from CBHC	\$54,000	

Total Expenditures: Sum of all expenditures. This line is automatically calculated.

Excess (Deficit): Difference between total revenues and total expenditures (must be zero).

Unallowable Costs: The following items are unallowable as direct expenses (not an exhaustive list):

Salaries and Benefits

- Sick time payout when an employee leaves the position or upon contract termination or program closure
- Severance pay upon employee resignation, contract termination, or program closure
- Payroll processing fees
- Tuition reimbursement
- Incentives
- Bonuses

Occupancy

- Rent for storage space
- Mortgage payments (interest and principal)
- Interest
- Depreciation
- Taxes
- Major maintenance or capital improvements
- Lawn maintenance
- Maintenance staff
- Security staff
- Pest control
- Garbage pick-up
- Costs associated with buildings/space not used by the funded program

Other Operating Costs

- Cost to attend Nonprofit Leadership Center trainings (CBHC has separate contract with NLC)
- Rental cars
- Vehicle lease or purchase
- Vehicle maintenance
- Expenses typically covered through the ASO
- Allocation of existing costs of an agency that do not directly relate to producing outcomes in the contract
- Postage machine rental or purchase
- Religious materials
- Prepaid gift cards (unallowable in most circumstances)
- Florida sales tax

**Children's Board of Hillsborough County
PRO 2026-03 Request for Proposals (RFP)**

Uniting Grant-Mentoring

Appendix (#7) –Hillsborough County Public Schools (HCPS) Letter of Support Instructions

Only if you are proposing to provide services on the school grounds of any Hillsborough County Public School site or asking for specific contributions from HCPS in support of your program, is collaboration with the district required prior to the submission of a grant application. If this is the case, a letter of support from the district is a required component of your grant application.

The Superintendent is the only person authorized to provide letters of support on behalf of the school district and/or participating schools. The district's Grants & Research Operations (GRO) Office facilitates the process to obtain a letter of support from HCPS.

To begin the process to obtain a letter, the organization must first provide information regarding the proposed project to GRO, along with a draft of the letter of support the organization wishes for the district to provide. Next, a team of district personnel will meet to review the request. Following this meeting, the team will make a recommendation to the Superintendent to provide the letter. This process may take two weeks or longer, depending on each partner's readiness and the level of detail provided with the request.

Failure to adhere to these guidelines will result in the district's inability to provide a letter of support for your application. In order to obtain the required letter from HCPS, please abide by the following guidelines:

1. Please submit the following to Amie Wilbanks, Director of Grants & Research (Amie.Wilbanks@hcps.net) no later than the **close of business at 4:00 PM on Tuesday, September 16, 2025:**
 - a. Brief description of the proposed project using template provided below.
 - b. Draft letter of support to be signed by the Superintendent – should include the purpose of the proposed project; a description of the services that will be provided to the school/district as a result of grant funding; and a description of the commitment/obligations of the school/district (use template).
3. GRO will contact you to schedule a virtual meeting or reach out via email with questions. The purpose of this meeting is to discuss the feasibility of the proposed project and activities with appropriate school and district personnel. Be prepared to discuss program logistics, identification of potential schools, and partnership expectations. Virtual meetings are anticipated to occur **between September 18 – September 23.**
4. If the proposed project is feasible, GRO will submit your draft letter to the Superintendent for consideration. An electronic version (PDF) of the signed letter of support will be returned to the organization no later than two business days prior to the grant submission deadline.

***Please keep in mind that a letter of support shows support of the project at the time of application but does not mean HCPS is held to any commitments stated therein. The applicant must understand that, if recommended for award by the Children's Board of Hillsborough County, they must follow all district procedures and policies, such as, but not limited to, those related to business, privacy, security, data acquisition, and programmatic concerns. Upon award the applicant must still receive proper final approval for their work by the district.**

5. Should the organization require any background data or statistics in support of a proposal, this information should be obtained from publicly available data sources, such as the following website from the Florida Department of Education (FDOE): <https://edudata.fldoe.org/>.

The FDOE website provides a searchable tool with data on school and grade level enrollments, demographics, school success indicators and student performance. Background data and statistics should not be requested from district offices and under no circumstances should individual schools be contacted to provide data.

Children's Board of Hillsborough County
PRO 2026 – 03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#8) – Community Review Team Scoring Criteria/Checklist

Rater Number _____ Date: _____

Mission Statement: The Children's Board invests in partnerships and quality programs to support the success of all children and families in Hillsborough County.

Organization:	
Program Name:	
2. Cover Sheet – Attachment (#1) (maximum 6 points)	
Score	
<p>Required Attachment #1 is the Cover Sheet and Signature Page which has two components:</p> <ol style="list-style-type: none"> The Cover Sheet is a series of questions about the Applicant Organization and Program to be completed within SurveyMonkey Apply. <ul style="list-style-type: none"> Download the Attachment #1 to print Signature Page from Two distinct individuals (Authorized Official and Board Chair) must date and sign the Signature Page. Scan and upload the document to SurveyMonkey Apply. 	<p>(4-6) – All fields answered and completed correctly; Program Summary understandable by the general public.</p> <p>(1-3) – Some fields left blank or not completed correctly; Program Summary lacks clarity of services.</p> <p>(0) – Most or no fields completed correctly.</p>
2.1.1 Organizational Overview (maximum 10 points)	
Score	
<ol style="list-style-type: none"> Organization's Mission Statement; Indicate years of operation and programs currently offered in Hillsborough County; Briefly describe qualifications and background of the management and finance staff and include if they are paid employees, volunteers, or contracted; Provide an example of how the organization ensures equal opportunity to employ staff, recruit volunteers, and recruit Board members based on the needs of the organization and demographic composition of Hillsborough County; Disclose any history of contract cancellation, filing of bankruptcy, lawsuits against the organization or its predecessor organization(s); and Describe organization's internal quality assurance procedures for managing grant funding in the following areas: <ul style="list-style-type: none"> Contract compliance; Meeting reporting deadlines; and Fiscal accountability. 	<p>(7-10) – Mission statement aligned; all bullet points addressed; staff qualifications aligned to maintain model fidelity; validated equal opportunity; established procedures for quality assurance; provided specific examples; and grant management can be fulfilled.</p> <p>(3-6) – Some bullet points not addressed; points addressed but not well developed; lacked specific examples requested and used general statements; uncertain if grant management can be fulfilled.</p> <p>(0-2) – Not well constructed; lacked too many details to ascertain organization capability of grant management.</p>
2.1.2 Financial Capability (maximum 10 points)	
Score	

Children's Board of Hillsborough County
PRO 2026 – 03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#8) – Community Review Team Scoring Criteria/Checklist

<ul style="list-style-type: none"> a) Indicate which accounting system is used by the organization; b) Indicate if written financial policies and procedures have been established; and c) Provide an example of how one is used in daily operations for managing grants. 	<p>(7-10) – All bullet points addressed; financial infrastructure and programmatically feasible; compliant with generally accepted accounting principles with specific examples.</p> <p>(3-6) – Some bullet points not addressed and not well developed; lacked specific examples and used general statements.</p> <p>(0-2) – Poorly constructed; lacked too many details to ascertain organization capability.</p>
2.1.3 Statement of Need and Population to be Served (maximum 10 points)	Score
<ul style="list-style-type: none"> a) Summarize the need with a clear description of the population you propose to serve, including age focus; and b) Specify program eligibility for participants to be enrolled in proposed program. 	<p>(7-10) – All bullet points addressed; connected to priority population, age focus, and sufficient evidence that services support local need.</p> <p>(3-6) – Some bullet points not addressed; not well developed. Data or evidence does not support local need.</p> <p>(0-2) – Poorly constructed; lacked too many details to ascertain if serving local need. No data or evidence to support need.</p>
2.1.4 Proposed Program Description and Design (maximum 20 points)	Score
<ul style="list-style-type: none"> a) Describe how the proposed program will implement the HCPS Framework from Page Four of this RFP. b) Specify locations, duration, and frequency of main service activities; c) Indicate average length of time in program; d) Describe how model fidelity for services will be sustained for students and schools; e) Describe staff and/or volunteer training requirements for the model; f) Describe strategies to enroll and retain participants; g) Describe how you ensure staff and practices are respectful and responsive to the needs of the people and schools you serve; and h) Describe software or tools utilized to collect, track, and report both demographic information and measurable performance outcomes. 	<p>(15-20) – All bullet points addressed; clear model type and design details with priority population; clear activities and method of service delivery; sound strategy to engage and retain participants; and process for collecting data described.</p> <p>(10-14) – Some bullets not addressed; all points addressed, but not well developed.</p> <p>(0-9) – Poorly constructed; lacked too many details to understand program components.</p>

Children’s Board of Hillsborough County
PRO 2026 – 03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#8) – Community Review Team Scoring Criteria/Checklist

2.1.5 Partnership and Collaboration (maximum 5 points)		Score
<p>a) Explain how the proposed model is supported by local evidence from the School District of Hillsborough County, families and/or assessments to support the need in Hillsborough County.</p> <p>b) Detail evidence from families that address best practices for service delivery.</p> <p>c) Specify Informal Partnerships, in-kind resources or Other Vendor Services necessary to deliver quality services and describe their role in the proposed program.</p>		<p>(4-5) Strong evidence of local data to support the need of proposed model; best practices for service delivery from families; and specific partnerships.</p> <p>(2-3) Some evidence of local data, best practices from families, and general reference to partnerships.</p> <p>(0-1) No evidence of local data, best practices from families, or any partnerships.</p>
2.2.1. Matrix/Work Plan– Attachment (#2) (maximum 10 points)		Score
<p>Required to complete Attachment #2 is the Matrix/Work Plan which outlines how the Proposer will meet outcomes, refer to Appendix (#5) Matrix/Work Plan Instructions. Complete only for Year One and keep to one page for each outcome selected.</p> <p>Objective: One sentence with the total number of participants that will be enrolled with a description of priority population, main service and location of service.</p> <p>Proposed Program Activities: Brief and specific service titles provided to priority population with frequency and duration.</p> <p>Outcomes: Choose three outcomes as written from the list below.</p> <ol style="list-style-type: none"> 85% of Children with Increased School Connection/Engagement 90% of Children Regularly Attend School 75% of Children with Improved Positive Social Behaviors 80% of Children with Improved Progress Towards Academic Success 95% of Children with On-Time Grade Promotion <p>Data Source: Name a proposed measurement tool to be used if available and/or where the data will be stored.</p>		<p>(8-10) – All requirements met; outcomes support program design; clearly defined activities.</p> <p>(4-7) – Some requirements met, outcomes do not support program design or were not from outcomes listed.</p> <p>(0-3) – Incomplete; no connection to program design.</p>
2.2.2 Budget – Attachment (#3) (maximum 20 points)		Score

Children’s Board of Hillsborough County
PRO 2026 – 03 Request for Proposals (RFP)
Leading Grant-Mentoring
Appendix (#8) – Community Review Team Scoring Criteria/Checklist

<p>Required to complete the Budget using Attachment #3 in which Proposers should include necessary funds to operate the program effectively according to the service delivery model to meet outcomes. Refer to the New Program Funding Budget Instructions, Appendix (#6) to develop the budget for First Year and Second Year.</p> <p>First Year Operating Budget is the amount deemed necessary for startup and services or to fully operate a year-round program between January 12, 2026 through June 30, 2026 and August 1, 2026 through September 30, 2026.</p> <ul style="list-style-type: none"> • First Year Operating Budget may not exceed \$200,000 • Do not include expenses for the month of July. <p>Second Year Operating Budget is the amount deemed necessary to fully operate the program between October 1, 2026 and September 30, 2027.</p> <ul style="list-style-type: none"> • Second Year Operating Budget may not exceed \$260,000. • An 11-month contract do not include expenses for the month of July. <p>Both First- and Second-Year includes four tabs:</p> <ul style="list-style-type: none"> • Tab (1) – New Program Funding Budget Summary, • Tab (2) – Salary Detail, • Tab (3) – First Year Budget Narrative, and • Tab (4) – Second Year Budget Narrative. 	<p>(13-20) – All requirements met; expenditures connect to program; narratives explain calculations; forms not altered.</p> <p>(6-12) – Some requirements not met; incorrectly completed or included unallowable expenses; connected to program with some exceptions.</p> <p>(0-5) – Did not follow instructions; no connection to program.</p>
2.2.3 Implementation Plan – Attachment (#4) (maximum 6 points)	
<p>Complete template provided to upload a <u>one-page</u> Implementation Plan based on the First Year Activities which includes anticipated start date for services.</p>	<p>(5-6) – All requirements met; Dates are within the contract period and included start date of services; realistic.</p> <p>(1-4) – Some requirements met; Start date of services not clear; Lacked detail; plan may be unrealistic.</p> <p>(0)– Not completed correctly or attachment not provided.</p>
2.2.4 Board of Directors– Attachment (#5) (maximum 3 points)	
<p>Complete the template provided.</p>	<p>(3) – All fields completed correctly</p> <p>(1-2) – Some information not provided; unclear titles or expertise.</p> <p>(0) – Not completed correctly or attachment not provided</p>
2.2.5 Letters of Support – Attachment (#6)	
No Score	

Children’s Board of Hillsborough County
 PRO 2026 – 03 Request for Proposals (RFP)
 Leading Grant-Mentoring
 Appendix (#8) – Community Review Team Scoring Criteria/Checklist

<p>Upload the required, current Letter of Support from the School District of Hillsborough County, refer to Appendix #7. Two additional letters may be uploaded ONLY if the proposed program will:</p> <ul style="list-style-type: none"> ○ Receive in kind goods or services to support the proposed program. Letters must be current, on the agency’s letterhead, including what will be provided, and signed by an agency representative. 	<p><i>Not Scored; only comments will be recorded.</i></p> <p>Were the letters required per RFP/current?</p>
<p>2.2.6 Audit, Review, Unaudited Annual Financial Statements – Attachment (#7)</p> <p>Reviewed by CBHC No Score</p>	
<p>Total (maximum 100 points)</p>	<p>Final Score</p>

Subject to public records and is open for inspection and copying in accordance with Chapter 119, Florida Statutes.