



CHSP RFP Workshop

New Agencies/New Directors

March 1 and 2, 2022

CHSP OVERVIEW

- County and City primary approach to human services funding
 - Over \$8 million granted last funding cycle
- Funding is for direct human service programs in Leon County, serving Leon County residents
- Agencies submit applications for programs that address one (or more) of eleven human service funding categories
- Reimbursable grant; Two-year funding cycle: FY 22-23, FY 23-24
 - FY is Oct. 1- Sept. 30
- Applications reviewed by volunteer Citizen Review Teams (CRT)

The goal of CHSP is to support the local human services delivery system through a citizen-led, streamlined, and performance-driven funding process.

CHSP OBJECTIVES

1. Ensure that a majority of CHSP funds are used to provide direct client services to the lowest socioeconomic areas where the most difficult social conditions exist.
2. Through the Citizens Review Teams, ensure that 100% of the funds are allocated towards the areas of greatest need and opportunity.
3. Support and maintain the optimal level of human services possible with the amount of resources available.
4. Provide a service delivery system that best matches identified community needs.
5. Target spending of CHSP funds towards a long-range perspective, which incorporates changing needs and trends relative to how needs should be met.
6. Provide a means for an ongoing review of the program and the financial needs of agencies participating in the CHSP process through program monitoring.
7. Provide a method for measuring the cost and effectiveness of the programs addressing multiple community needs.

CHSP OBJECTIVES

8. Use CHSP funds to complement and supplement the agencies' budgets for the provision of comprehensive services, including all tax-supported and voluntary agency activities.

9. Ensure that funds are distributed to human services agencies without unnecessarily duplicating program funding at the expense of others.

10. Eliminate duplicate preparation of applications, reviews, or interviews by agencies.

11. Maximize the level of state and federal funds coming into the community through match opportunities.

12. Provide a forum for information sharing and an opportunity to find common ground in defining terms, goals, and objectives.

13. Ensure that CHSP funded agencies adhere to the American Institute of Certified Public Accountants (AICPA) standards of accounting for nonprofits.

CHSP ELIGIBILITY

1. An agency must attend one of the mandatory workshops in order to apply for funding in the two-year grant cycle. The agency's official representative in attendance must be an employee or board member.
2. The agency must be a nonprofit corporation, incorporated in Florida or authorized by the Florida Department of State to transact business in Florida, pursuant to Chapter 617, Florida Statutes.
3. The agency must have obtained a 501(c) (3) status from the US Department of Treasury
4. The agency must be authorized by the Florida Department of Agriculture and Consumer Services to solicit funds, pursuant to Chapter 496, Florida Statutes.
5. The agency must have obtained a sales tax exemption registration from the Florida Department of Revenue, pursuant to Chapter 212, Florida Statutes.
6. The agency has a local board of directors and/or a local advisory board.
7. The agency must have by-laws adopted by the Board of Directors.
8. The agency must have a comprehensive Fiscal Management Policy that includes appropriate internal controls to protect the fiscal integrity of the agency.

CHSP ELIGIBILITY

9. The agency must have a Check Signing Policy that requires two or more signatures based on certain fiscal thresholds approved by the agency's board of directors. This policy must specify that no agency staff, including the executive director, can sign a check written to themselves or written for cash. The policy must also include specifications and internal safeguards (direct board oversight) regarding making withdrawals from the agency's account(s).

10. The agency must demonstrate that it has adequate internal fiscal controls in place to clearly document how grant funds are spent; and it has the appropriate personnel (including volunteers) capacity to carry out the stated program goals and objectives.

11. If required by federal or state law, the agency must have its books and records audited annually by an independent certified public accountant who has no affiliation with the agency and whose examination is made in accordance with generally accepted auditing standards. The audit report must not be no more than two years old. The audit report must include a management letter and financial statements showing the following: all the agency's income, disbursements, assets, liabilities, endowments, and other funds; as well as the agency's reserves and surpluses during the period under study; and be consolidated with the statements of any affiliated foundations or trusts.

12. If the audit contains a schedule of findings, a corrective action plan must be included with the audit.

CHSP ELIGIBILITY

13. The agency must show proof of filing an IRS Form 990, 990EZ, Postcard, or extension within the last fiscal year.

14. The agency must have an administrative cost of 25% or less as evidenced by the IRS Form 990 and/or audit.

15. The agency must have a Nondiscrimination and Equal Opportunity Policy.

16. The agency must have proof of general liability insurance coverage.

17. The agency must have a Records Retention Policy.

18. The agency must have a Conflict of Interest Policy.

19. The executive director and board president (or vice president) must sign the application.

CHSP FUNDING RESTRICTIONS

- CHSP funds can only be used to provide direct client services to Tallahassee/Leon County residents.
- For programs serving school-age children, CHSP funds can only be used to serve children and youth who are currently or were formerly enrolled in Leon County schools (grades K-12).
- Programs targeting students enrolled in college can only use CHSP funds to serve college students who document graduation from a Leon County school.
- CHSP funds awarded to university-based programs cannot be used to pay for student waivers or indirect costs.

CHSP FUNDING RESTRICTIONS

- CHSP funding for new agencies is limited to **7.5%** collectively for each funding category. A new agency is defined as an organization that has not been awarded CHSP funding in the previous **two** funding cycles.
- The City's CHSP budget comes from several sources including general revenue, Change for Change, and Community Development Block Grant (CDBG). To be eligible for CDBG funds, program activities must meet one of the three national objectives:
 - benefit low and moderate-income persons
 - prevent or eliminate slum and blight
 - meet an urgent need as defined by the U.S. Department of Housing and Urban Development (HUD)
- Grants are reimbursements after proof of eligible expenses are submitted (monthly or quarterly).

DIVERSITY, EQUITY & INCLUSION (DEI)

- New application questions
- Board composition
- UPHS agency self-inventory is a resource
- DEI Training:
 - Mandatory training for Executive Directors & CEOs (Board Chairs optional)
 - March 7 still available- 10:00 a.m. - 12:00 p.m. at the Leon County Main Library (200 W Park Ave)
- Citizen Review Team volunteers - DEI integrated into mandatory workshop later this spring

CHSP TEAMS

1-Children's
Services

2-Community
Support Services

3-Service for
Persons with
Disabilities

4-Basic Needs &
Emergency
Services

5-Family Support
Services

6-Health Services

7-Senior Services

8-Youth
Recreation,
Character Building
& Mentorship

9-Youth Education
Employment &
Training

10-Promise Zone
Services

11-Homeless
Services

New

UNIFORM GOALS, OUTCOMES & PERFORMANCE METRICS

- Partnership with FSU Askew School of Public Administration & Policy
- Approved by County and City Commission following feedback and support of CHSP Agencies
- Uniform Performance Measures
 - Six (6) Service Goal Categories
 - 12 Common Outcome
 - 16 Common Performance Metrics
- Team 11 (Homeless Services) will use BBCoC metrics

REUBIN O'D. ASKEW SCHOOL OF PUBLIC ADMINISTRATION & POLICY

Dr. Gary VanLandingham

Dr. Linda Schrader

Dr. David Berlan



chsp

WORKING
TOGETHER
FOR GREATER
IMPACT



community human service partnership

SERVICE GOALS

Support healthy families

Support individuals and families in crisis and emergency situations

Enhance quality of life for persons with disabilities

Improve healthcare for vulnerable populations

Enhance quality of life for elders

Strengthen academic performance and reduce risk factors for at-risk youth (K-12)

COMMON OUTCOMES

Improve early childhood development and achieve developmental milestones

Improve academic achievement

Improve youth behavior and positive life outcomes

Secure and maintain employment

Support family safety and self-sufficiency

Improve access to health and supportive services (including physical, dental, & mental health)

Secure and maintain stable housing

Support emergency recovery

Expand access to legal representation

Provide nutritional stability

Support social connection and physical activity

Provide caregiver support

COMMON PERFORMANCE METRICS

Youth with improved childhood development assessment score and/or meeting developmental milestones

Students promoted to next grade (Kindergarten ready / K-12)

Students completing high school and enroll in postsecondary education

Youth residing in at-risk neighborhoods have reduced negative outcomes (disciplinary and delinquency incidents, teen pregnancy, substance abuse, gang involvement)

Youth developing management and self-protection skills

Persons in at-risk neighborhoods receiving safety net and supplemental education services (households/youth)

Persons obtaining/retaining employment (parents/youth)

Persons obtaining/maintaining stable housing (households/youth/elders)

Persons linked to service provision

Persons receiving emergency needs support (households/youth)

Persons with legal needs met

Persons receiving nutritional supports

Persons receiving improved access to health, mental health, dental services, and supportive services

Persons gaining self-sufficiency skills to manage disability and health issues

Elders receiving social supports to manage health care risks and end-of-life decisions

Caregivers receiving respite supports

ASKEW SCHOOL TECHNICAL SUPPORT



Available to:

- Answer clarifying questions
- Schedule a follow-up Q&A session
- Design projects to build measurement capacity or other needs

Unavailable to:

- Review individual proposals, assist with editing or revisions, or otherwise interfere with individual organizations' applications





FOLLOW UP PROJECTS

- Graduate student led and faculty supervised projects, usually built into classes
- Can be team or solo projects, and serve the needs of a single or multiple agencies
- When built into courses, have usually not required labor costs to be covered
- Course options:
 - Summer 2022: Independent sector
 - Fall 2022: Capstone projects, Program Evaluation, Managing Nonprofit Organizations
 - Spring 2023 and later: Capstone projects, others TBD



UNIFORM GOALS, OUTCOMES & PERFORMANCE METRICS

- Report on one or more Common Performance Metrics quarterly
- CHSP staff will work with agencies on reporting new measures
- Agencies may still report on measures unique to their programs

NEW HOMELESS SERVICES TEAM

- New Team 11 approved by City and County Commissions in July 2021
- Administered in partnership with Big Bend Continuum of Care (BBCoC)
- Programs addressing homeless services previously funded through other CHSP categories will now apply through Category 11.

NEW HOMELESS SERVICES TEAM

Prioritization will be given to applicants that effectively demonstrate how their proposed projects will:

- Decrease chronic homelessness
- Decrease the length of time someone experiences homelessness
- Decrease returns to homelessness
- Integrates racial equity planning considerations in the implementation and use of homeless services resources
- Increases collaboration efforts to address needs of special populations

NEW HOMELESS SERVICES TEAM

Eligible Services include:

- Homelessness Diversion & Prevention
- Street Outreach
- Shelter Operations
- Essential Services
- Permanent Supportive Housing
- Rapid Rehousing

Funded agencies must become a member of BBCoC, participate in the BBCoC Coordinated Entry System and to use the Homeless Management Information System (HMIS) for data reporting.

TEAM II GOALS, OUTCOMES & PERFORMANCE METRICS

Goal: Reduce homelessness

Outcomes:

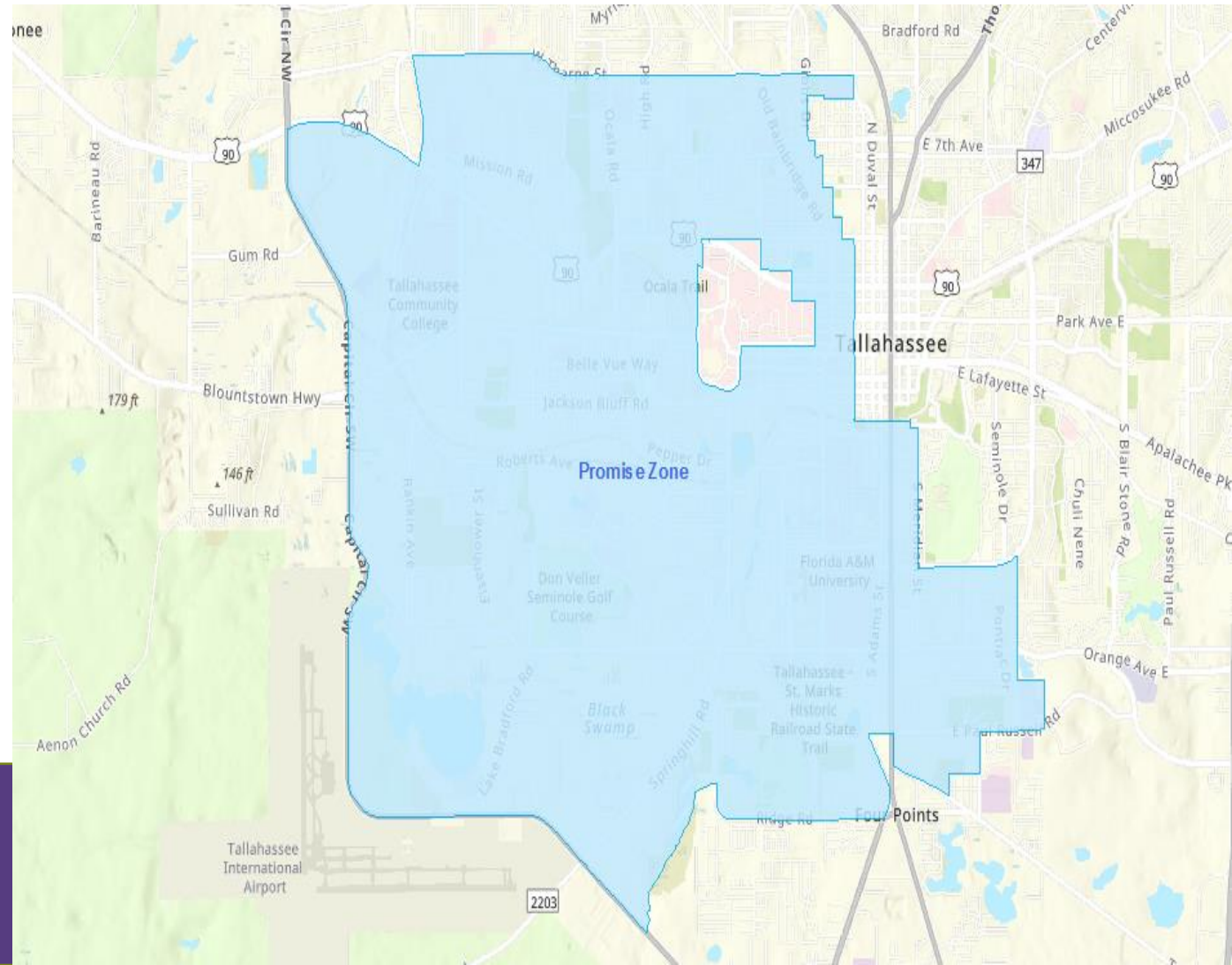
- Homelessness is rare, brief and nonrecurring.
- Persons experiencing homelessness obtain permanent housing quickly.
- Chronically homeless persons obtain permanent supportive housing.
- Adequate temporary shelter is provided.

Uniform Metrics:

- Length of time persons remain homeless
- Persons experiencing homelessness are connected to housing and supportive services
- Persons experiencing homelessness obtain employment and increase income
- Persons retaining housing through homelessness prevention services
- Persons experiencing homelessness obtaining and retaining permanent housing

PROMISE ZONE FUNDING – NEIGHBORHOOD FIRST PLAN ALIGNMENT

- The Promise Zone was created to address multiple community revitalization challenges in a collaborative way.
- Programs funded in this category must serve residents in the census tracts that define the Promise Zone and provide direct client services in at least one of the following human service categories: 1) Youth Services, 2) Family Services, 3) Employment, Training and Placement Services, and 4) Health Services



PROMISE ZONE FUNDING – NEIGHBORHOOD FIRST PLAN ALIGNMENT

- The Promise Zone (PZ) includes the neighborhoods of Greater Bond, Frenchtown and Griffin Heights.
- The City Commission adopted Neighborhood First Plans for those three neighborhoods developed by residents in the community to address poverty and inequity.
- Funding will be prioritized for programs that align with one or more of the Neighborhood First Plans.
- The Neighborhood First Plans can be found at the following link:
<https://www.talgov.com/neighborhoodservices/neighborhoodfirst.aspx>
- Programs applying for PZ funding must identify the priority areas, strategy and action items within the Neighborhood First Plan to be addressed.

ROLES AND RESPONSIBILITIES

Funding Partners: City of Tallahassee and Leon County

- Establish funding levels once every two years.
- Define any funding constraints.
- Review and approve the final funding recommendations.
- Establish and support an online system for information, applications, reimbursement reporting and volunteer management.
- Develop and adopt the policies, goals, and objectives that govern the Community Human Service Partnership.

ROLES AND RESPONSIBILITIES

CHSP staff:

- Develop and update program materials
- Provide training and technical assistance to agencies
- Technical review of applications to ensure eligibility
- Recruit and train CRT volunteers
- Coordinate grant process, appeals committee
- Disseminate funding recommendations
- Execute, manage agency contracts

ROLES AND RESPONSIBILITIES

Agencies:

- Attend mandatory workshops (RFP, DEI)
- Ensure agency meet eligibility criteria
- Ensure accuracy of application, submit by deadline
- Review CRT roster to identify conflicts of interest
- Conduct program presentations in accordance with instructions
- Comply with CRT recommendations
- Request and prepare for Appeals Hearing, if warranted
- Attend the contract management workshop(s) if funded
- Comply with the stipulations in the contract(s)
 - Data tracking, timely and accurate reporting/reimbursement requests

ROLES AND RESPONSIBILITIES

Citizen Review Teams (CRT):

- Attend mandatory training
- Identify and communicate potential conflicts of interest
- Attend all agency presentations and team deliberations
- Review all programs, make impartial decisions based on need, cost, effectiveness, etc.
- Complete agency evaluations
- Provide information to agencies for opportunities for improvement
- Represent the CRT in Appeals Hearing, if warranted

CRT Team Leader and Timekeeper help to ensure process runs smoothly and in accordance with the CHSP manual

PROCESS AND TIMELINE

- Applications due March 25, 5pm
- Website: www.chsportal.org
- Staff conduct technical review of applications for eligibility
 - March 25- April 6
- CRT recruitment and training – March and April
- Staff develops the agency presentation schedule, notifies agencies – April
- Agency Presentations (virtual)- May 3 - June 14

PROCESS AND TIMELINE

- Award letters released- July
- Deadline for appeals hearing- July
- Appeals hearing- July
- City and County Commission agendas- adoption of final recommendations
 - September

AGENCY PRESENTATIONS

- Virtual
- CHSP staff will develop and distribute the presentation schedule and arrange virtual meeting logistics.
- **If using Power Point slides or other visual aids, please upload them (PDF) the CHSP portal in the “Notes and Communications” section 2 business days prior to the agency’s presentation.**
- See Appendix A of manual for tips on effective program presentations.

AGENCY PRESENTATIONS

Presentation Site Review Format Based on Number of Programs Submitted for Review

Number of Programs for Review	Presentation Format
Applying for three (3) or fewer programs	Program review: 15 minutes, Budget: 5 minutes, Q/A: 10 minutes
Applying for four (4) or more programs	Program review: 20 minutes, Budget: 10 minutes, Q/A: 15 minutes

PROGRAM PRESENTATION REQUIREMENTS

- Clearly document the need for the program, including providing local and current information detailing the prevalence of the social problem that the program proposes to address.
- Provide an overall description of the program that includes demographics, program activities, operation (days/times/location), staffing, program design justification, partnerships.
- Highlight the program's client outcomes accomplished in FY 2020/2021; and discuss the program's progress in meeting the anticipated outcomes during the current fiscal (2021/2022). If applicable, provide data on the program's Social Return on Investment (SROI).
- Highlight how the organization internalizes and operationalizes Diversity, Equity, and Inclusion through policies, programs, and trainings for staff and agency leadership.
- If this is a new program, discuss the program's anticipated client outcomes and Social Return on Investment (SROI).
- If the agency received a programmatic finding from the CRT in the last funding cycle (2020/2021-2021/2022), discuss the agency's progress toward correcting the applicable finding.



WORKING
TOGETHER
FOR GREATER
IMPACT



community human service partnership

BUDGET PRESENTATION REQUIREMENTS

- Describe the program's budget by detailing the specific sources of income and expenditures. Focus this discussion on the **proposed fiscal year budget**.
- If the agency and/or program has experienced significant budget changes, please explain.
- Provide a fiscal explanation of how the CHSP funds will be used to support the program's implementation.
- If you are requesting a funding increase compared to the program's current CHSP funding level, provide a justification for your request.
- Specify how the lack of (or reduction of) CHSP funds will impact the program, its participants, and the community.
- If there are serious concerns, particularly findings, noted in the agency's audit, demonstrate how the agency has corrected or is currently addressing those concerns/findings.
- **Optional:** Summarize the overall agency budget by detailing the specific sources of income and expenditures, including administrative/fundraising costs. Focus this discussion on the projected budget.

VOLUNTEER DELIBERATIONS & FUNDING RECOMMENDATIONS

Upon completion of the agency presentations, each CRT member completes the Assessment Scoring Guide, deliberates agency requests, develops priority rankings, and makes funding recommendations for each program reviewed.

Some of the factors considered in the assessment process include:

- The documentation of need for the program and its compatibility to the funding partners' priorities
- The agency's ability to execute and administer the program
- The Board of Directors' ability to provide adequate leadership and oversight (e.g., meets regularly, sets internal fiscal controls and policies)
- The program design and its ability to effectively address the needs of the target population
- The agency's past performance, including client outcomes
- The projected program outcomes for the proposed funding cycle
- The agency's ability to collaborate and leverage its resources
- General comments, recommendations, and findings included in the FY 2020/2021 – 2021/2022 CHSP award letter.

AGENCY REPORT CARD & ASSESSMENT GUIDE

- CHSP staff will prepare a “Report Card” for each application to inform CRT volunteers of agency/program eligibility and completeness of the application.
 - The report card will also inform CRT volunteers about program performance, budget performance and timeliness for previously funded agencies.
- CRT volunteers complete an assessment guide form for each application, rating programs on:
 - Program Justification
 - Program Design
 - Diversity, Equity & Inclusion
 - Board Oversight & Governance
 - Financial Management
 - Program Administration

FUNDING NOTIFICATION/AWARD LETTERS

- CRTs prepare award letters for each agency which include general comments, funding recommendations and findings.
- Once funding allocations are made, CHSP staff determines which partner will fund each program.
- The agency director and the chairperson of the Board of Directors receive the CHSP award letter, which notifies the agency of the right to appeal the CRT recommendation.
- If an agency meets the appeals' criteria, the CHSP Appeals Committee will conduct a hearing.
- The final CHSP recommendations are submitted to the City and County Commissions for approval.

CONTRACTING AND REPORTING

- Funded agencies will be required to enter into a contract with one or both funding partners for each of the fiscal years in the funding cycle.
- Contracting workshop will be held to provide more detailed information
- Agencies will work with CHSP staff to determine budgets and performance target based on awarded funding.
- Funded agencies are required to provide quarterly reports on progress in the CHSP portal
- Reimbursement requests submitted monthly or quarterly

APPEALS PROCESS

- A request for an appeal must include documented evidence that the funding request was inappropriately denied or reduced due to gross misconduct, error, or misinterpretation by the Citizens Review Team; a denial or reduction of the funding request alone is not a sufficient condition to appeal.
- **Only agencies that were awarded CHSP funding in FY 2020/2021 – 2021/2022 are eligible to participate in the appeals process.**
- Requests for an appeals hearing must be submitted in writing to the CHSP staff within the timeframe designated in the CHSP award letter.
- If an appeal is granted, a hearing will be scheduled within a reasonable timeframe to review all significant issues concerning the appeal.
- An independent Appeals Committee, consisting of CRT team leaders and members, will be appointed. No member of the appealing agency's original CRT can serve on the Appeals Committee.
- The CHSP staff is available to provide technical assistance.
- The decision rendered by the Appeals Committee is final.

FLORIDA SUNSHINE LAW

Florida's Government in the Sunshine Law, commonly referred to as the Sunshine Law, provides a right of access to governmental proceedings of public boards or commissions at both the state and local levels.

There are three basic requirements

- meetings of public boards or commissions must be open to the public;
- reasonable notice of such meetings must be given; and
- meetings will be recorded.

CONTACTS

FSU Askew School of Public Administration and Policy

(assistance with goals, outcomes, performance metrics)

Dr. Gary VanLandingham

Dr. Linda Schrader

Dr. David Berlan



United Partners for Human Services

(assistance with program application)

Lashawn Gordon
Lashawn@uphsfl.org
850.296.8330



CONTACTS

City of Tallahassee:

Reception Desk: 850-891-6566

Anita Morrell, Human Services Manager
Direct line: 850-891-6561
Email: Anita.Morrell@talgov.com

Robyn Wainner, Human Services Coordinator
Direct line: 850-891-7174
Email: Robyn.Wainner@talgov.com

Cheryl Beasley, Human Services Specialist
Direct line: 850-891-7097
Email: Cheryl.Beasley@talgov.com

Leon County:

Reception Desk: 850-606-1900

Abby Sanders, Human Services Analyst
Direct Line: 850-606-1913
Email: sandersa@leoncountyfl.gov

Malinda Harris, Human Services Specialist
Direct Line: 850-606-1948
Email: harrisma@leoncountyfl.gov

CHSP PORTAL OVERVIEW & APPLICATION REVIEW

CHSP Portal: www.chspportal.org

