



**THE COMMUNITY HUMAN SERVICE PARTNERSHIP
FY 2014/15 PROGRAM DESCRIPTION**

TABLE OF CONTENTS

- Section One: Introduction..... 3
- Section Two: Goals and Objectives..... 4
- Section Three: Description of Fund Distribution Process5-7
- Section Four: Definition of Roles and Responsibilities8-11
- Section Five: Presentation Tips12-14
- Section Six: Funding Eligibility Requirements and Constraints15-16
- Section Seven: CHSP 2014/2015 Time Line.....17-18
- Section Eight: Appeal Procedures 19
- Section Nine: Human Services Funding Areas.....20-24
- Section Ten: Collaboration Approaches25-26
- Section Eleven: Application Submission Requirements & CHSP Staff27-30



SECTION ONE: INTRODUCTION

Eighteen years ago, the City of Tallahassee, Leon County, and the United Way of the Big Bend collaborated to form the Community Human Service Partnership (CHSP). Overall, the CHSP serves as a joint planning and funding distribution process, which utilizes a standardized funding application, site visit format, and review and recommendation process. Furthermore, recognizing the need to make improvements in the overall approach to funding public services, the CHSP was formulated to address various systems' challenges that resulted due to the lack of coordination among the three local funding agents. This initiative, which includes a joint planning board, requires greater coordination and cooperation between funding sources and among agencies, affords easy recognition of duplication and gaps in service delivery, and provides the ability to target funds accordingly.

The CHSP partners work jointly through a planning board made up of representatives from each partner's organization. This partnership utilizes staff and community volunteers to implement a joint agency review process, resulting in joint funding recommendations that translate into a more comprehensive service delivery system -- one with a greater impact and higher level of results.

The CHSP partners continue to obtain feedback from Citizens Review Team volunteers and agency directors with regard to the process. Based on that feedback, the process continues to evolve as we make adjustments for improvement. We appreciate the support and look forward to constructive input.

One point that needs to be clearly understood is that the citizen review process allocates funds to programs as one sum from all of the partners; however, each of the funding sources must retain the approval authority for the funds coming from their budgets. Because of this factor, recommendations will be identified as coming from a specified funding source. Each funding source will approve their allocations separately at the Commission or Board level. Please note, lack of funds coming from a source should not be interpreted as lack of support. The total allocation received from CHSP demonstrates the support of all of the CHSP partners.

It is recognized that the United Way represents eight counties in the Big Bend area, while CHSP focuses exclusively on Leon County. Additionally, United Way funds may only be distributed to certified member agencies. Similarly, a portion of the City of Tallahassee funds may only be allocated to agencies providing services to low/moderate income families, to eliminate slum and blight, or to meet a particular urgent need based on federal HUD guidelines.

SECTION TWO: GOALS AND OBJECTIVES

The goal of the CHSP fund distribution process is to review agencies' capabilities and performance and match requests for program funding to community needs, then distribute the available funds in a manner that assures a balanced, effective and efficient human services delivery system.

Objectives adopted by the Joint Planning Board are as follows:

1. To assure that a majority of CHSP funds are used to provide direct client services to the lowest socio-economic areas where the most difficult social conditions exist.
2. Through the Citizens Review Teams, the partnership will assure that 100% of the funds are allocated towards the areas of greatest need and opportunity.
3. To support and maintain the optimal level of human services possible with the amount of resources available.
4. To provide a service delivery system that best matches identified community needs.
5. To focus spending of CHSP funds toward a long-range perspective, which incorporates changing needs and trends relative to how needs should be met.
6. To 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. To provide a method for measuring the cost and effectiveness of programs addressing multiple community needs.
8. To use CHSP money to complement and supplement the agencies' budgets for the provision of comprehensive services, including all tax-supported and voluntary agency activities.
9. To ensure that funds are distributed to human service agencies without unnecessarily duplicating program funding at the expense of others.
10. To eliminate duplicate preparation of applications and reviews/interviews by agencies.
11. To maximize the level of state and federal funds coming into the community through match opportunities.
12. To provide a forum for information sharing and an opportunity to find common ground in defining terms, goals and objectives.
13. To ensure that CHSP funded agencies adhere to American Institute of Certified Public Accountants (AICPA) Standard of Accounting for Non-Profits.

SECTION THREE: DESCRIPTION OF FUND DISTRIBUTION PROCESS

The CHSP fund distribution process begins with all of the funding parties allocating dollars to the process and defining any limits or constraints placed on their dollars. Each funding source names two representatives to the Joint Planning Board (JPB).

The CHSP has adopted several human services areas to form a continuum of care model. This model consists of the following human service areas: basic needs and emergency services, community support, senior services, services to persons with disabilities, family support, physical health, substance abuse, youth recreation and character building, youth education, and children's services.

The Joint CHSP staff appoints the team leadership for each Citizens Review Team (CRT). Leadership of each team consists of the Team Leader and Time Keeper. Members of the United Way Basic Needs Council (BNC), the City of Tallahassee Community Improvement Advisory Council (CIAC), and the Leon County Human Services Grant Review Committee (HSGRC), as well as long-term volunteers when necessary, fill these leadership positions on each review team. These volunteers lead the team through the review process and present their team's decisions at their respective committee meetings following final recommendations by teams.

The joint staff will determine the amount funded from their respective grantors based on the total allocation recommended by the Citizens Review Teams (CRTs). These decisions are based on funding constraints, availability of funds, and other administrative factors. The joint staff is the most knowledgeable regarding their own funding restraints and requirements.

Recommendations from the Citizens Review Teams as well as the appeals process will be forwarded to each applicant agency, in accordance with the procedure outlined in this Description Manual. The final CHSP recommendation will be submitted to the partners' Boards and/or Commissions for approval.

Joint staff will ensure that all the necessary information is complete by reviewing the application materials. **The Fatal Flaws policy will be enforced by staff.**

If an agency is submitting an application for more than one program, they may request to be reviewed by separate review teams. However, joint staff will make final determinations regarding program placement on a particular team.

Prior to the site visit, all volunteers will be trained on the use of the application materials and on the evaluation process. They will review, in advance, copies of all application materials.

Agency reviews will take place either at the agency's site or at some other approved location. During the site visit, the team leaders will guide the review team through a three-step process: a program review, a budget review, and a question and answer period. This format is carried out in three segments. Agencies applying for **three or fewer programs have one hour to present**, with 30 minutes for program review, 10 minutes for budget review, and 20 minutes for questions/answers. Agencies submitting **four or more programs for review are allowed an hour and a half**, with 40 minutes for program review, 20 minutes for budget review, and 30 minutes for questions/answers. The chart provided on page **six** outlines the presentation format.

In order to ensure that all agencies are treated equitably, under no circumstances will the Team Leaders allow the agency to go outside of the prescribed site review format. Additionally, it is mandatory that the agency provides a formal budget presentation, focusing on the following specific areas:

- Describe the overall agency budget, including admin/fundraising costs.
- If there are significant budgetary changes impacting the agency or the program, please explain.
- Specifically, justify the need for CHSP funding, and explain how CHSP funds will be used to support the implementation of the program.
- If you are requesting a funding increase compared to the program's current CHSP funding level, please provide a specific rationale, including fiscal justification, for your request.
- If funded last year, how does this request compare to last year?
- Identify the program's other sources of funding.
- Specify how the lack of (or reduction of) CHSP funds would impact the program, its participants, and, if applicable, the community.
- If there are concerns, particularly findings, noted in the agency audit, provide an explanation of how the agency is currently or is planning to address those stated concerns.
- Describe the agency's overall fiscal management policies and practices.
- Explain the role of the board in providing fiscal oversight and ensuring that internal controls are in place to protect the agency's fiscal integrity.

The Presentation 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--30 minutes, Budget--10 minutes, Q/A--20 minutes
Applying for four (4) or more programs	Program review--40 minutes, Budget--20 minutes, Q/A--30 minutes

Upon completion of the agency presentations, each team will complete the Volunteer Assessment Guide, deliberate agency requests, develop priority rankings, and make recommendations for each program being reviewed. They will take into consideration the criteria delineated in the Volunteer Assessment Guide, which includes:

- The need for the program as demonstrated by the agency and its compatibility with any priorities that may have been set by the Joint Planning Board and the individual funding partners.
- The review team's opinion of the agency's ability to execute and administer the program.
- The agency's past performance.
- The projected and/or reported outcomes of the agency and program.
- The ability of the agency to collaborate and leverage their resources.
- The site visit evaluation criteria identified in the Volunteer Assessment Guide.
- General comments, recommendations, and findings included in the CHSP 2013/14 award letter.

Factors to consider in the evaluation process.

The Citizens Review Teams will also prepare a list of non-financial *general comments or recommendations* for each agency. General comments include suggestions, positive feedback, and other thoughts and ideas from the team that are meant to be constructive and helpful to the agency's success. These comments and/or recommendations may include, but not limited to, the areas of planning, budgeting, organizational structuring, facilities, service delivery, outcome measurement, and positive aspects of the agency and program.

The award letter also includes findings. Suggest that you thoroughly read the comments and, in particular, the findings section included in the CHSP 2013/2014 award letter. Findings represent programmatic or administrative concerns documented by the Citizens Review Team. It is important to note that findings not remedied may affect the level of funding that an organization receives in current or future funding cycles. Please note that if an agency receives a finding, conditions prescribed to correct those findings will be specified in the City and County contracts as well as through the United Way Certification process.

Specific conditions that can result in findings are as follows:

- 1) Financial instability indicated by having a "going concern opinion" in the audit or other evidence of financial instability.
- 2) Stated audit concerns, including the issuance of findings and material weaknesses, not addressed or corrected by the agency.
- 3) No measurable, substantive, or relevant (as defined by the funding categories) outcomes or results listed, shown, or explained.
- 4) Incorrectly preparing the budget forms, including, but not limited to: presenting an unbalanced budget or presenting a budget consisting of errors or omissions. For example, not submitting an itemization of listed miscellaneous revenues and expenses.
- 5) Not following the mandatory CHSP program and budget presentation format.
- 6) Egregiousness: Any condition that represents a chronic and/or vital programmatic or administrative concern.

Overall, CHSP includes the following strategic steps:

- A public notification process.
- A mandatory workshop for interested private, not-for-profit organizations.
- Use of a standardized application, which includes legal, organizational, financial, managerial, programmatic, and program evaluation information.
- Technical assistance is available after the workshop for a period of several weeks.
- Submission of agency applications by a designated time frame.
- A technical review of all applications.
- Recruitment and training of volunteers.
- The organization of volunteers into Citizens Review Teams (CRTs).
- Each team reviews the applications, conducts program site visits, completes agency/programmatic assessments, recommends priorities, and makes initial funding recommendations.
- CHSP staff determines funding allocations based on legal, procedural and historical factors.
- Agency award letters, which include direct feedback from CRTs, are forwarded.
- An appeal process is built into the CHSP process.
- Recommendations from the CRTs are forwarded to each funding source's citizen-staffed committee.
- Recommendations are submitted to the City Commission, the Leon County Commission and the United Way Board of Directors for final approval.
- Contracts and memorandum of agreements are executed. The CHSP funding cycle is from October 1, 2014, to September 30, 2015.

SECTION FOUR: DEFINITION OF ROLES AND RESPONSIBILITIES

A. CHSP FUNDING SOURCES

- ✓ **Definition:** City and County Commissions and the United Way Board of Directors.
- ✓ **Responsibilities:**
 1. Determine annually the respective funds committed to the allocation process
 2. Determine any constraints put upon these funds
 3. Designate two representatives to serve on the Joint Planning Board
 4. Review and approve final funding recommendations

B. THE JOINT PLANNING BOARD (JPB)

- ✓ **Definition:** Two appointed representatives from each of the three funding sources.
- ✓ **Responsibilities:**
 1. Recommend policies and procedures for the overall CHSP process
 2. Recommend funding priorities
 3. Recommend initial allocations to review teams
 4. Assign a Joint staff to:
 - Conduct the overall management of the CHSP process
 - Distribute agency applications
 - Seat the review teams with community volunteers
 - Conduct agency and volunteer training

C. JOINT CHSP STAFF

- ✓ **Definition:** A joint staff, representing all three funding sources, responsible for the overall management of the CHSP process.
- ✓ **Responsibilities:**
 1. Development of the CHSP application
 2. Distribution of the application
 3. Recruitment and team placements of Citizens Review Team volunteer
 4. Selection of team leadership positions for the Citizens Review Teams
 5. Training of agencies and review team volunteers
 6. Perform technical review of applications
 7. Ensure all applicant constraints and qualifications are satisfied
 8. Facilitate the overall CHSP grant review process

9. Support efforts of the Citizens Review Teams, the Appeals Committee, and the Joint Planning Board
10. Remove any CRT member who may become unable to effectively work within the committee process
11. Determine, considering constraints, administrative costs, etc., which funding source should fund each program
12. Prepare funding recommendations for standing committees
13. Take recommendations to the governing bodies of each funding source for final approval
14. Forward funding recommendations to applicants

D. APPLICANT AGENCIES

- ✓ **Definition:** Agencies serving Leon County meeting CHSP requirements.
- ✓ **Responsibilities:**
 1. Attend agency training sessions
 2. Submit completed application by the stated deadline in accordance with the submittal instructions noted in the CHSP Description Manual
 3. Review CRT roster and immediately notify CHSP staff of potential conflicts
 4. During the site-visit, present programs to CRT members following the standard, approved format as noted in the CHSP Description Manual
 5. If warranted, by the designated time frame, request and prepare for an appeal hearing
 6. Follow through on implementing the Citizens Review Team's recommendations

E. CITIZENS REVIEW TEAMS

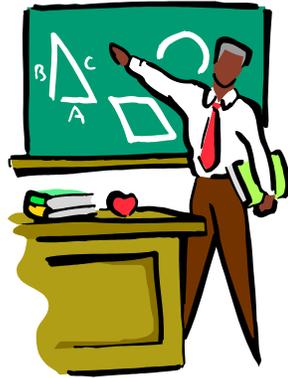
- ✓ **Definition:** Through the CHSP process, Citizens Review Teams (consisting of community volunteers) are established to review agency applications, attend site visits, hear presentations, and make funding recommendations, which are forwarded to CIAR, CIAC and UWCIC. The three leadership positions (Team Leader and Team Time Keeper) appointed to each team are selected from the membership of the HSGRC, CIAC, UWCIC, and other experienced CHSP volunteers.
- ✓ **Responsibilities:**
 - *Citizens Review Team Leader*
 1. Attend mandatory training session
 2. Read all application materials
 3. Immediately notify CHSP staff of any potential conflicts with an assigned agency
 4. Forward any questions/concerns to CHSP staff prior to site visits
 5. Attend all agency presentations and deliberations
 6. Act as facilitator for site visits and team deliberations
 7. Keep agency presentations appropriately program specific
 8. Keep team deliberations appropriately program specific
 9. Keep order and assure that team discussions focus solely on information obtained from agency materials and presentations

10. Maintain an environment during site visits and deliberations that allows each CRT member to express his/her opinions openly
 11. Rank programs and make funding decisions based on need, proficiency of service delivery, cost effectiveness, program quality, agencies' ability to carry out programs, and overall accountability of agencies and programs
 12. Participate fully in the decision making process, making recommendations in a fair, professional and unbiased manner
 13. Complete agency evaluations and return to CHSP staff immediately after completion of team deliberations
 11. Turn in any reports and/or related materials to CHSP staff in a timely manner
 12. Ensure that the Citizens Review Team operates in a fair, professional and impartial manner
- *Citizens Review Team Time Keeper*
 1. Assumes duties of Team Leader in his/her absence
 2. Attend mandatory training session
 3. Read all application materials
 4. Immediately notify CHSP staff of any potential conflicts with an assigned agency
 5. Forward any questions/concerns to CHSP staff prior to site visits
 6. Attend all agency presentations and deliberations
 7. Rank programs and make funding decisions based on need, proficiency of service delivery, cost effectiveness, program quality, agencies' ability to carry out programs, and overall accountability of agencies and programs
 8. Participate fully in the decision making process, making recommendations in a fair, professional and unbiased manner
 9. Complete agency evaluations and return to CHSP staff immediately after completion of team deliberations
 10. Manage the agency site visit, ensuring that the site visit adheres to the amount of time given for each segment of the presentation
 11. Ensure that the Citizens Review Team operates in a fair, professional and impartial manner
 - *Review Team Members*
 1. Attend mandatory training session
 2. Read all applicant materials
 3. Immediately notify CHSP staff of any potential conflicts with an assigned agency
 4. Forward any questions/concerns to CHSP staff prior to site visits
 5. Attend all agency site visits and the deliberation session
 6. Rank programs and make funding decisions based on need (community), proficiency of service delivery, specific client outcomes, cost effectiveness, program quality, agencies' ability to carry out programs, and overall accountability of agencies and programs
 7. Complete agency evaluations and return to CHSP staff immediately after completion of team deliberations
 8. Participate fully in the decision making process, making recommendations in a fair, professional and unbiased manner

9. Work cooperatively with other team members, respecting their right to voice opinions openly
10. Provide other non-financial recommendations for each applicant agency
11. Ensure that the Citizens Review Team operates in a fair, professional and impartial manner

Any team member displaying inappropriate behavior during site visits or deliberations may be asked to remove him/herself from the process by CRT leaders or CHSP staff.

SECTION FIVE: TIPS FOR A SUCCESSFUL SITE REVIEW PRESENTATION



Along with the CHSP application, the site visit is a crucial aspect of the funding cycle. The following site visit tips have been compiled by volunteers and CHSP staff in an effort to help enhance your presentation and to assist volunteers in getting the best possible information during your site visit. The recommendations are not reflective of any one agency, nor are they inclusive. Hopefully, these tips will allow you to present your program(s) in the most positive manner to the Citizens Review Team (CRT).

In order to ensure that all agencies are treated equitably, please note, under no circumstances will the Team Leaders allow the agency to go outside of the official site review format as noted on pages 5-6. Additionally, as noted on pages 5-6, it is mandatory that the agency presents a formal budget presentation.

1. Avoid negatively comparing your program to other programs. Simply focus on promoting and showcasing your program and allow the team to draw their own conclusion regarding the comparative quality of the program.
2. Focus on the present and the future in your presentation. Limit your discussion regarding the previous year's CHSP allocation unless it is relevant to your presentation. For example, if your prior year's allocation was decreased, your presentation is not going to be enhanced by announcing this fact to the Citizens Review Team. If anything, this has a negative effect, making the CRT members wonder what must have prompted the previous committee's decision to decrease the allocation.
3. If any staff member, board member or volunteer has strong negative feelings toward any or all of the CHSP partners, this may not be the best person to utilize for your agency presentation unless they are absolutely essential. These strong feelings might be exhibited during the presentation.
4. Any supplemental information you can provide for the CRT at the time of the site visit is welcome as long as it agrees with the information provided in your application. Easy-to-read charts tracking how the proposed allocations would be spent, fact sheets, agency history, national vs. local statistics, etc., are helpful tools to utilize during the presentation. DO NOT make changes to your original application and present these changes to the CRT during the presentation without prior approval from the CHSP staff. Therefore, amended application forms will not be accepted at the time of the site visit without prior staff approval.

5. Stay within the allotted time frames for each segment of the site visit as specified in the CHSP application. While agency tours are allowed, no additional presentation time will be allotted. Please do not sacrifice the opportunity to promote your program(s) in lieu of a tour. The best way to ensure that your agency maintains the specified schedule is to practice prior to the formal presentation. Make sure that all participants included in the presentation clearly understand their roles, time-limit restraints, etc.
6. If the agency is presently experiencing problems on a local level, address the issue(s) openly and briefly explain what happened and how the issue(s) was (or is being) resolved by the agency. If you have experienced recent problems at the national level, briefly address the issue(s) with the volunteers and do as much as you can (again, briefly) to distance your local chapter or organization from the national problem. Then move on, but anticipate on responding to possible concerns during the question and answer period. If the problem is an old issue, do not address it; however, be prepared to do so if questions should arise.
7. Try not to respond to the Citizens Review Team's questions in a defensive manner, even when a question may sound critical. The team members are only trying to understand your agency and its program(s).
8. If you are requesting funds for salaries, explain to the volunteers how the salaries will be translated into the delivery of direct client services.
9. Encourage board members to attend the site visit. Explain the level of board participation in the overall operation of the agency (i.e., committee structure, frequency of meetings, role in maintaining internal fiscal controls, particularly for agencies that don't meet the audit requirement).

If your board is not diverse, please explain what steps, if any, are being implemented to increase diversity. Telling the CRT that you tried to increase diverse representation on your board but could not find anyone qualified is often considered by committee members as an unacceptable justification.

10. Informing the CRT about matching-funding opportunities (such as federal or state matching funds) is very compelling evidence to present at the presentation. Please provide specific fiscal and statistical information in reference to dollar amounts and client services.
12. If a video is necessary, make sure it is cued up and ready to go. Clips from movies on your agency's issues or local news releases are usually not appropriate. However, if the information is especially compelling and can only be conveyed through the use of the video, then it may be appropriate to use it. Please be careful not to use a lengthy video in lieu of a live presentation.
13. Be prepared for the review team to arrive up to 15 minutes late or early. Although the CRT strives to maintain the given schedule, occasionally unforeseeable circumstances can occur.
14. Highlight how your agency is able to leverage its limited dollars by securing donations, volunteer service hours, and other funding sources to help implement your program(s).
15. Please note that the CHSP partnership consists of three funding sources: Leon County, the City of Tallahassee, and the United Way of the Big Bend. All three funding sources contribute their human

services dollars into the CHSP funding distribution process; in addition, a representative of each of the three funding bodies holds a strategic leadership position on the CRT.

16. *If you have questions regarding filling out the CHSP application or the agency site visit, please contact a CHSP staff person in a timely manner for technical assistance.*

SECTION SIX: FUNDING ELIGIBILITY REQUIREMENTS AND RESTRAINTS

A. General CHSP requirements are as follows:

- ❑ CHSP funds will only be granted to programs providing direct client services to City of Tallahassee/Leon County residents.
- ❑ CHSP funds can only be used to support a specific human service program that provides direct client services.
- ❑ Furthermore, the applicant agency must demonstrate that it has appropriate 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.
- ❑ Applications for FY 2014-2015 will not be accepted from agencies failing to attend (and register at) one of the mandatory workshops.
- ❑ **All grant application deadlines are final.** No extensions shall be granted.
- ❑ **All agencies must meet the minimum legal requirements shown on Form One of the 2014/2015 Grant Application and the **Nonprofit—Organizational Standards Checklist.****
- ❑ **Grant applicants that do not meet the standards specified in Section Eleven:** General Instructions for Submission of the Applicant Packet and CHSP Contact Persons **will not be accepted.** This standard is based on the premise that the agency has failed to meet the submission deadline for the CHSP application.
- ❑ **Fatal Flaws:** *Specific conditions that will result in the rejection of the application* for consideration in the 2014/15 CHSP funding process include:
 - 1) Missing sections of the application.
 - 2) Not submitting the most recently submitted IRS 990, 990EZ, or Postcard in accordance with the federal regulations.
 - 3) Not submitting the most recently completed audit – no more than two years old, if applicable.
 - 4) Missing signatures of the executive director and board president on both the electronic and hard copy.
 - 5) Not submitting the CHSP Check Signing Policy that requires two or more signatures based on certain fiscal thresholds approved by the board of directors. Furthermore, the policy must specify that no agency staff, including the executive director, can sign a check written to him/her or written for cash. The policy must also include specifications and internal safeguards (board oversight) regarding making withdrawals from the agency's account(s).
 - 6) Not submitting documentation of having current liability insurance.
- ❑ CHSP funds awarded to university-based programs cannot be utilized to pay for student waivers or indirect costs.
- ❑ New agencies (CHSP applicant agencies not funded in the current fiscal year 2013/14) are subject to a **7.5% funding cap**, which is **applicable to each human service funding category.** Therefore, in regards to each human service funding category, the Citizens Review Team can only allocate to new agencies a total of 7.5% of available funding.
- ❑ Program grants are normally awarded for a twelve-month period, with the fiscal year beginning on October 1, 2014, through September 30, 2015. An official letter notifying the agency of the funding recommendation will be mailed to the agency director at the end of the grant review period.

B. The City of Tallahassee funding requirements are as follows:

To be eligible for Community Development Block Grant federal funds (CDBG), program activities must meet one of the three national objectives. Those three objectives are identified as: benefiting low- and moderate-income persons; preventing or eliminating slums and blight; and meeting an urgent need as defined by the U.S. Department of Housing and Urban Development (HUD). Agencies applying for these funds through the CHSP should focus on how their program(s) will meet one or more of the three stated objectives. Please note, due to federal regulations, city specific fiscal and legal requirements, and other applicable policies that govern the City's Human Services Division, agencies that receive City funds are required to: enter into a formal contractual agreement; submit proof of expenditures for reimbursements; submit quarterly client demographic and progress reports; and maintain an acceptable client and fiscal record keeping system, which is subject to on-site monitoring by City and County staff.

C. The Leon County funding requirements are as follows:

Agencies that receive County funds are required to: enter into a formal contractual agreement; submit quarterly client demographic and progress reports; and maintain an acceptable client and fiscal record keeping system, which is subject to on-site monitoring by County and City staff.

D. The United Way of the Big Bend funding requirements are as follows: To receive funds from the UWBB an agency must be a Certified Partner Agency.

SECTION SEVEN: CHSP 2014/2015 TIME LINE

(Please note, this time line is subject to minor modification)



DECEMBER 2013

- Agency workshop notification advertised in the Tallahassee Democrat and emailed.

JANUARY 2014

- RFP agency workshops. Applications available at the workshop.
- Citizens Review Team (CRT) volunteers recruited.
- Staff available for technical assistance to agencies in application preparation.

FEBRUARY 2014

- Staff available for technical assistance to agencies in application preparation.
- **Grant application deadline is Friday, February 28, 2014, by 5:00 p.m.**
- Limited technical review of applications by Joint staff.
- Volunteer and agency assignments to CRTs.

MARCH 2014

- Funding sources determine funds available for allocation.
- Notify agencies of the site visit schedule.
- Review Team volunteer training sessions conducted.
- Review Team Leader volunteer training sessions conducted.

APRIL/ MAY 2014

- Review team site visits/deliberations are conducted.

JUNE/JULY 2014

- Funding sources review CRT recommendations.
- CHSP partner funding split is determined.
- Compilation of agency award letters.
- Agencies are notified of 2014/2015 allocations and opportunity to appeal.

AUGUST/ SEPTEMBER 2014

- Agency appeals hearings, if needed.
- United Way Board approval of final recommendations.
- County Commission's approval of final recommendations.
- City Commission's approval of final recommendations.
- Agencies receive Leon County and City of Tallahassee contracts.

OCTOBER 2014

- Funding cycle begins.

SECTION EIGHT: APPEAL PROCEDURES

CHSP has an appeals process in place whereby an agency may appeal if the following condition applies:

You have a right to appeal this decision by submitting a written request for a hearing. A denial or reduction in funding request alone is not appealable; your request must include documented evidence that your funding request was inappropriately denied or reduced due to gross misconduct, error, or misinterpretation by the Citizens Review Team. **This condition only applies to agencies funded by the CHSP process in fiscal year 2013/2014.**

Requests for an appeal hearing must be submitted in writing to the CHSP staff by the time frame designated in the CHSP recommendation letter. ***Please limit the appeal request to a two-page letter and state (document) clearly how the condition noted above applies to your agency.*** Simply restating the above condition is not sufficient and will cause an appeal request to be denied.

In the event the Appeals Committee approves the request for an appeal, a hearing will be scheduled within a reasonable time frame to review all significant issues concerning the appeal. The Appeals Committee, appointed by the joint staff, may consist of CRT team leaders or any other volunteers as deemed necessary. Joint staff is present for technical assistance. **The decision of the Appeals Committee is final.**

In summary, the appeals process will consist of the following steps:

- Agency notification of the CRT recommendations and timeline to submit an appeal
- Agency submission of intent to appeal
- Appointment of an appeals committee
- Agency notification of the agenda, timeline, requirements, and members appointed to the appeals committee
- Agency's responsibility to notify staff immediately if a member on the appeals committee poses a conflict of interest
- The steps included in the appeals hearing are as follows:
 1. CRT members present
 2. Agency presentations
 3. Deliberation and final recommendations rendered (appeals criteria applied)
 4. Agency notification

The CHSP and its representatives will make every effort to ensure that its citizens' review process is conducted in a manner that will yield a non-biased and fair review of each program.

SECTION NINE: HUMAN SERVICES FUNDING CATEGORIES & FRAMEWORK

Team One: Children's Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided to children from infancy through elementary school.	Alleviates issues with successful development of infants and children.	Targets at-risk children's needs in the areas of physical, cognitive, communication, social, emotional, or adaptive development.	Coordinates individual, family, and community resources to maintain quality of life and healthy development of at-risk infants and children.

Team Two: Community Support Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided to the community at-large.	Direct, community-based services that collectively support the overall wellbeing of the community at-large.	Address overall community needs by providing various services such as, but not limited to, the following: information and referrals, rape and crisis intervention, counseling, legal assistance, literacy, employment and training.	Serve as a community safety net to ensure that critical services are made available to the public.

Team Three: Services for Persons with Disabilities	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided to persons with disabilities.	Early identification of persons at risk of or diagnosed with a disability.	<p>Provision of therapeutic and wrap-around services for individuals with temporary disabilities.</p> <p>Provision of therapeutic and wrap-around services to minimize the handicapping effects of the disability.</p> <p>Enable individuals with disabilities to reach their fullest potential, including, but not limited to, the following: removing obstacles such as structural barriers, obtaining and keeping employment, maintaining independent living, and reaching educational and developmental milestones, etc.</p>	<p>Help to ensure persons with disabilities have the tools, support, and opportunity to achieve success, including maximizing their ability to live independently.</p> <p>Improve long-term ability to manage their self-care and/or improve mobility within their home or the community at-large.</p>

Team Four: Basic Needs & Emergency Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct services providing relief for the most basic and emergency needs such as clothing, food, shelter, household items, rental or utilities assistance, etc.	Coordinate community efforts and resources for the purpose of removing obstacles that place individuals, adults, and/or families at risk for economic difficulties or social problems, including homelessness.	Helps children, adults, and/or families meet crisis and fundamental needs such as food, clothing, housing, economic support, household supplies, and utility assistance. Also, reduce behaviors that place individuals or families at risk of economic difficulties, including homelessness.	Assists children, adults, and/or families achieve self-sufficiency and improve quality of life. Provide supportive services that allow individuals, adults, and/or families to meet their most fundamental needs.

Team Five: Family Support Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided primarily to families in an outpatient setting or within a family-focused residential setting, as opposed to serving individuals.	A proactive, comprehensive approach that focuses on the overall health and well-being of individuals within the family unit.	Assist at-risk families in the midst of crisis reach stabilization and permanency. Provide crisis intervention to reduce family dysfunction, including family violence, detachment, parenting and isolation. Assist families in meeting their most fundamental needs, including: learning how to manage limited resources; obtaining safe, affordable housing; and developing life management skills, such as budgeting, that lead to self-sufficiency.	Assist families improve quality of life and achieve and maintain safety and self-sufficiency. Provide supportive services to pregnant women at risk of homelessness and poor pregnancy outcomes.

Team Six: Physical Health Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided to individuals and/or the community at-large, either for general health or for specific health related conditions.	A proactive, comprehensive approach that is designed to: promote wellness in order to prevent medical conditions; identify medical conditions early and issue appropriate treatment; and reduce the rate and spread of contagious diseases, etc.	Improve health outcomes and the quality of life for persons who otherwise may not get the medical and/or dental care they require. Educate and assist patients in navigating the complex medical care system, including accessing resources and services. Assists persons in effectively managing chronic, long-term health conditions, as well as end-of-life decision-making.	Provide ongoing healthcare services to holistically address the medical needs of persons who otherwise may not get the medical and/or dental care they require.

Team Seven: Senior Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided to seniors.	Promote physical, emotional, cognitive, and social functions of seniors at risk of chronic health conditions, poverty, or social isolation.	Assist seniors with managing a disability, daily living, health and safety, end of life decision making, or with personal care needs in order to enhance their quality of life, including remaining in their own homes.	Coordinate personal, family or community resources that help seniors maintain or improve their quality of life.

Team Eight: Substance Abuse Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services provided to prevent substance abuse, to rehabilitate persons with alcohol and drug dependency, and/or support long-term recovery	A proactive, comprehensive approach that is designed to preclude, forestall, or impede the development of substance abuse problems.	<p>Early Intervention: Alleviates or reduces risk factors (e.g., gang involvement, academic failure, family conflict, trauma, availability of drugs) that are directly associated with substance abuse.</p> <p>Identify persons in the early stages of problem behaviors and attempt to avert the ensuing negative consequences by inducing them to cease their problem behavior through various intervention methods.</p> <p>Treatment: Services are designed to help individuals and their families that have lost their abilities to control the substance use on their own and require formal, structured intervention and support to reduce and stop the cycle of addiction. Such services include various levels of outpatient and residential support.</p>	Recovery support is offered during and following treatment to further assist individuals in their development of the knowledge and skills necessary to maintain their recovery. These services include, but are not limited to, the following: transitional housing, life skills training, parenting skills, family reunification, and peer-based individual and group counseling.

Team 9: Youth Recreation & Character Building Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services targeting middle school through high school aged youth.	<p>A proactive, comprehensive approach that is designed to reduce <i>risk factors</i> and strengthen <i>protective factors</i> that lead toward healthy youth development.</p> <p><i>Risk factors include, but are not limited to:</i> individual, family, peer/social, and community risk factors such as the availability of drugs and gang involvement.</p> <p><i>Protective factors include, but are not limited to:</i> family attachment, opportunities for pro-social involvement, mentorship, and educational opportunities.</p>	<p><i>Primarily, focus on building character, safety planning, social and independent living skills, self-esteem, community participation, and life management skills.</i></p> <p>Foster positive qualities in at-risk youth such as the acquisition of life management skills, anger and stress control, responsible decision-making, delayed gratification and long-range planning, substance abuse resistance skills, along with social and emotional skills necessary for a successful life outcome.</p> <p>Reduce negative behaviors (e.g., antisocial behaviors and gang and drug involvement) that lead to delinquency and criminality.</p>	<p>Provide supportive services that enable youth to minimize their risk factors, enhance their protective factors, and successfully reach their life milestones.</p>

Team 10: Youth Education Services	Outcome Areas		
	PREVENTION	INTERVENTION	SUPPORT
Direct client services targeting middle school through high school aged youth.	<p>A proactive, comprehensive approach that is designed to reduce <i>risk factors</i> and strengthen <i>protective factors</i> that lead to healthy youth development and academic achievement.</p> <p><i>Risk factors include, but are not limited to:</i> individual, family, peer/social, and community risk factors such as the availability of drugs and gang involvement.</p> <p><i>Protective factors include, but are not limited to:</i> academic achievement, family attachment, opportunities for pro-social involvement, mentorship, and educational opportunities.</p>	<p>Primarily, promote educational achievement, development of employability skills and employment, and trade instruction.</p> <p>Foster positive qualities in at-risk youth such as the acquisition of life management skills, anger and stress control, responsible decision-making, delayed gratification and long-range planning, substance abuse resistance skills, along with social and emotional skills necessary for a successful life outcome.</p> <p>Position youth to successfully matriculate through the education and training process, which include, but is not limited to the following: being promoted, passing standardized tests, and completing a GED, technical training or college.</p>	<p>Provide supportive services that enable youth to successfully accomplish their educational and training goals.</p>

SECTION TEN: COLLABORATION APPROACHES

There are **several different approaches to describe collaborative efforts**. In organizational systems, collaboration can occur at the direct service level, the administrative level or community-wide. Effective collaborative efforts are built on short-term and long-term goal setting as a collective group. The following collaborative approaches were adopted by the Joint Planning Board, which acts as the policy-making umbrella of the Community Human Service Partnership (CHSP). *When completing Form 6* of the grant application, please use this section as a reference.

Commonly utilized approaches include:

- ✓ **An individual client referral** to another agency or resource is the most commonly used approach.
- ✓ **An interagency agreement with shared client responsibilities:** For example, the Department of Children and Families acts as the client's primary case manager while referring chronically challenged families to alternative programs that have the capabilities of providing intensive in-home services. Families who are referred to these alternative programs must meet specified eligibility criteria as established by both parties. Formalized partnership agreements, as opposed to other informal working arrangements, help to provide those involved with a clear picture of their expected contribution to the collaboration process. Through written partnership agreements, roles and responsibilities are clearly delineated. Such an agreement provides structure, stability, and commitment to the ongoing work of collaborating.

Coalitions and Associations: A collection of agencies with similar focuses meeting on a regular basis (i.e., monthly, quarterly) to address common issues and challenges is another effective collaborative intervention strategy.

- ✓ When **collaborative staff development** exists, all partners in the collaborative effort join to co-sponsor and participate in shared training. Collaborative staff development enhances common skills and knowledge across programs resulting in increased levels of understanding and trust. Partners experience an increased willingness to share resources and expertise and a decreased level of "turf guarding." Individuals, families and communities can be provided with the most effective services available to meet their needs.
- ✓ **Coordinated community outreach efforts** are crucial to successful collaboration. Accomplished through means such as newsletters, open houses, orientation meetings, health fairs, and other community-based activities, outreach programs increase community awareness, buy-in, and participation in programs and services. Outreach must be addressed if the collaboration effort is to reach its potential.
- ✓ **Community development:** concerted efforts are targeted at a given community to address specific social problems. Therefore, intervention strategies are tailored to meet the specific needs of the targeted population. For example, federal, state, and local government entities have distributed massive amounts of dollars to address the impact of HIV/AIDS; however, the rate of HIV/AIDS continues to accelerate. Experts are re-evaluating the use of traditional (single-agency) intervention

strategies to service particular communities and populations. They now recognize the need to explore creative targeted approaches for solving community-based problems. These approaches must be well thought out and carefully planned, taking into consideration the uniqueness of the community (i.e., culture, income range, natural resources, severity of social conditions, developmental history, and "help seeking behaviors").

When we target the community for change, our efforts are directed at causing that change. We may accomplish this through a number of methods which include: creating new services, improving the delivery of existing services, or implementing innovative intervention strategies, drawing upon the resources of the community. In summary, collaboration is based on the premise that groups of agencies (and collective resources) working together enhance each other's chances of being successful at having an immediate, intermediate and long-term impact in any given community.

SECTION ELEVEN: APPLICATION SUBMISSION REQUIREMENTS AND
CHSP CONTACT PERSONS



PLEASE CAREFULLY REVIEW THE DIRECTIONS NOTED BELOW:

**The Mandatory Submission Due Date for the 2014/2015 CHSP Application is
By 5:00 pm., on Friday, February 28, 2014**

General Submission Requirements

- All agencies must meet the minimum legal requirements** shown on Form One of the 2014/2015 Grant Application and the Nonprofit—Organizational Standards Checklist.
- The grant application deadline is final. No extensions shall be granted.**
- Use the exact forms provided in the 2014/2015 grant application; you are not allowed to modify any CHSP forms. **Failure to utilize the exact forms provided in the 2014/2015 CHSP application will result in the rejection of the application.**
- Each application must include all forms (Forms 1-6) listed in the 2014/2015 CHSP Grant Application, including a complete copy of the agency's most recently submitted 990, 990EZ, or Postcard and audit** (along with the Management Letter and all written responses/correspondence applicable to the audit).
- Grant applicants that do not meet the standards specified in Section Eleven: General Instructions for Submission of the Applicant Packet and CHSP Contact Persons will not be accepted.** This standard is based on the premises that the agency has failed to meet the submission deadline for the CHSP application and that all applicants must be treated equally.
- Fatal Flaws: *Specific conditions that will result in the rejection of the application*** for consideration in the 2014/15 CHSP funding process include:
 - 1) Missing sections of the application.
 - 2) Not submitting the most recently submitted IRS 990, 990EZ, or Postcard in accordance with the federal regulations.
 - 3) Not submitting the most recently completed audit – no more than two years old, if applicable.
 - 4) Missing signatures of the executive director and board president on both the electronic and hard copy.
 - 5) Not submitting the CHSP Check Signing Policy that requires two or more signatures based on certain fiscal thresholds approved by the board of directors. Furthermore, the policy must specify that no agency staff, including the executive director, can sign a check written to him/her or written for cash. The policy must also include specifications and internal

safeguards (board oversight) regarding making withdrawals from the agency's account(s).

6) Not submitting documentation of having current liability insurance.

Application Submission Requirements

- Three (3) unbound, collated, three-whole punched grant applications**
- One complete application on a Jump-Drive with a minimum of 4GB**
- Special Note: If your agency is requesting placement on more than one Citizens Review Team, provide three complete sets of the application and one application saved on a minimum 4GB Jump-Drive for each team assignment. For further clarification, please call one of the staff contacts listed on page 25.**
- Do not attach brochures, flyers, letters of support, etc.** These items will be discarded. However, you can distribute such materials at the site visit.



SUBMISSION OF LEGAL DOCUMENTS

- Agency's current **by-laws**
- Agency's registration letter with the **U. S. Department of Treasury, Section 501 (c) (3)**, Internal Revenue Service Code, for exempt status
- Agency's registration letter with the **Florida Department of Agriculture and Consumer Services**, pursuant to Chapter 496, FS (If your organization is exempt, as provided for in sections 496.403 and 496.406, FS, submit three copies of the agency's exemption letter.)
- Agency's proof of registration as a non-profit corporation with the **Florida Department of State, Division of Corporations** pursuant to Chapter 617, FS (which can be obtained by accessing sunbiz.org)
- Agency's registration letter with the **Florida Department of Revenue** pursuant to Chapter 212.08 F.S. **State Sales Tax Exemption**
- The agency's proof of **liability insurance**
- Agency's **statement of non-discrimination and its equal opportunity policy** for employees, volunteers and clients
- Agency's **Fiscal Management Policy**, including a dual check signing policy/procedure. **The procedure must include the Check Signing Policy language noted on page four of the 2014/15 CHSP Application.**

- The following agency policies: **Records Retention** and **Conflict of Interest policies/procedures**.
- If the agency's program(s) requires **licensing by local, state or federal agencies**, please attach three copies of the licenses required (i.e., occupancy licenses, Health Department license, coverage needed for operation, DCF certifications, etc.).
- Three (3) collated, paper copies of all of the legal documents noted in this section**
- One complete set of the legal documents noted in this section on a Jump-Drive with a minimum of 4GB**



Instructions on how to prepare the Jump-Drive are as follows:

- Utilize one Jump-Drive with a *minimum of 4GB*.
- Ensure that all documents are collated.
- Save all documents as **PDF file(s)**.
- **Develop two files** to store the information.
- **List the first file as "Team Number (for example, Team 8) and Agency Name"** and save the complete application, including the 990 and audit.
- **List the second file as "Agency Name and Legal Docs"** and save all required legal documents to this file.
- **Submit your Jump-Drive in a sealed envelope, and list the agency name and team assignment on the envelope.**



**Applications must be submitted by 5:00 p.m.
on Friday, February 28, 2014 to:**

Anita Morrell, Human Services Analyst

(Direct: line: 891-6553 or switchboard: 891-6500)

The City of Tallahassee

Department of Economic & Community Development

435 North Macomb Street, the Renaissance Building (3rd floor)

Tallahassee, Florida 32301

(Located in the historic Frenchtown Community)

(Please note, the Renaissance building closes precisely at 5:00PM)

**CHSP STAFF PERSONS CAN BE REACHED AT THE FOLLOWING CONTACT NUMBERS
AND EMAILS:**



Arnold McKay, United Way of the Big Bend

Switchboard: 414- 0844

Fax Number: 414- 0852

arnold@uwbb.org

Pat Holliday, City of Tallahassee

Direct line: 891- 6524 or

patricia.holliday@talgov.com

Anita Morrell: 891- 6561

anita.morrell@talgov.com

Sarala Hermes: 891-6553

sarala.hermes@talgov.com

Switchboard: 891- 6500

Fax Number: 891- 6592

Tiffany Harris, Leon County

Direct Line: 606-1922

Switchboard: 606-1900

Fax Number: 606-1943

harristi@leoncountyfl.gov