



Juvenile Welfare Board

Investing in children. Strengthening our community.

**NON-OPERATING & CAPITAL PROJECTS
REQUEST FOR APPLICATIONS**

FUNDING WORKSHOP

AGENDA

- Introduction
- RFA Funding Criteria and History
- RFA Timeline
- Submission Details
- Evaluation Criteria and Process
- Award and Agreement
- IT Best Practices
- Questions and Answers

FUNDING WORKSHOP

▪ Purpose of Funding Workshop

- For JWB to provide an overview of the RFA requirements to **increase understanding**
- Opportunity for applicants to **ask JWB questions** about specific parts of the solicitation
- Permits JWB opportunity to **determine if there are gaps or corrections** to be made to the RFA

▪ Important Notes

- Oral statements or responses will not amend the RFA
- Suggestions or modifications may be included as addenda
- Written questions and responses from today and any resulting addenda will be posted on JWB website

OBJECTIVE of RFA

- To make **one-time-only investments in capacity building projects** for 501(c)(3) organizations that currently receive program funding from JWB
- Enhance **long-term operational effectiveness and efficiency** (see questions in Project Description and Statement of Need)
- Supports capital projects of **new acquisitions or the replacement or renovation** of deteriorated capital assets

FY24/FY25 COMPARISON

FY24

- Funding Available: \$2.9 million
- Request Minimum: \$10,000 per project
- Request Maximum: \$200,000 per Application
- Max # of Projects: 2

FY25

- Funding Available: \$5.1 million
- Request Minimum: \$10,000 per project
- Request Maximum: \$350,000 per Application
- Max # of Projects: 3

HISTORY

- **Types of projects awarded in FY24:**
 - Facility 52%
 - Technology 36%
 - Facility/Security 3%
 - Technology/Facility 3%
 - Transportation/Technology 3%
 - Transportation 3%

QUALIFICATIONS

- **Must:**
 - currently **receive program funding** from JWB
 - be a **501(c)(3)** organization at time of application
 - **not** be on a **JWB Corrective Action Plan or Performance Improvement Plan** from the time of submission through award

ELIGIBLE CAPITAL PROJECT REQUESTS

- Application Submission
 - Each agency may submit one application
 - Requests can include up to **three projects**
 - Projects **must benefit a JWB-funded program** (see questions in Return on Investment)
 - Requests must be a minimum of \$10,000, and all 3 projects **must not exceed \$350,000**

- Eligible Capital Projects
 - Related items purchased to acquire or improve long-term assets
 - Non-recurring and have a useful life greater than one year
 - **Training** costs eligible if associated with a capital purchase

EXAMPLES OF ELIGIBLE PROJECTS

- **Participant Management System**
 - Software Subscription Fee (initial cost only)
 - Professional services related to customizing software
 - Implementation costs
 - Training related to the software

- **Facility Repair or Enhancement**
 - Roof Replacement
 - Flooring

- **Computer Lab for Program Participants**
 - Computers
 - Furniture
 - Labor for Set-Up

ELIGIBLE REQUESTS

▪ JWB encourages:

- Capital IT requests for **participant management systems** to upload data directly to JWB and/or data systems, like **donor databases**, that can expand, diversify and manage their revenue sources.
- Requests that enable coordinated, rapid **recovery from a disaster** and/or reduces the agencies business risk exposure.

INELIGIBLE EXPENSES

- Exclusively for **non-JWB funded programs**
- **Operating** costs (including staff development, office and classroom supplies, training not associated with capital purchase, equipment lease or rental, space rental)
- For items that are **unrelated** to one another
- Built-in costs for potential **project overruns** (exception of certain projects such as construction or renovation)
- **Expenses budgeted** to be paid for **by other available sources** of revenue
- JWB is exempt from paying Federal Excise Tax and State of Florida sales **taxes**

PURCHASING REQUIREMENTS

- **Quotation Requirements**
 - Items > \$5,000 require three current quotes (quoted after 09/03/2024)
 - Items > \$5,000 must be summarized in Form 4 - Vendor Quote Summary
 - Written quotes must be attached to Form 4 - Vendor Quote Summary
- **Sole Source Justification**
 - If only one source is available, attach the quote and a written justification to Form
- **Insufficient Quotations**
 - If unable to get three quotes, attach the procured quotes and a written explanation to Form 4
- **See questions in Return on Investment**

MINIMUM CONTRACT TERMS AND CONDITIONS

- **Contract Amendment Terms**
 - Provided in Attachment 2, Sample Contract Amendment
- **Exceptions to Terms**
 - Must be identified and noted in Form 5
 - Absence of exceptions implies acceptance
 - Exceptions may be considered in the selection process
- **Terms that are Not Applicable**
 - Identify in Form 5

LAND USE RESTRICTION AGREEMENT



- May be required for projects on owned or leased property
 - Subject to JWB Board approval
- Land Use Restriction Agreement
 - May require signing of Attachment 3
- Compliance Indication
 - Indicate compliance or exceptions via Special Condition 5 in Form 5
- Depreciation of Assets Schedule
 - Attach schedule for JWB consideration
 - To be included in the agreement

ADVANCE REQUESTS

- Funding Basis
 - JWB provides funding on a cost reimbursement basis however **advance requests may be considered**, subject to approved policy on Non-Operating and Capital Projects RFA Advances
- Advance Request Form
 - Form 6 - Non-Operating and Capital Project Advance Request Form
 - Must be completed and submitted with detailed project draw schedule for the project amount requested from JWB that identifies expected monthly expenditures
 - Advance amount **limited to highest expected monthly expenditure**

RFA TIMELINE

- **09/03/24:** RFA Released
- **10/02/24:** Optional Funding Workshop
- **10/08/24:** Deadline for Receipt of Questions by Noon
- **10/11/24:** Final Written Responses to Questions Released
- **10/16/24:** Technical Assistance, by appointment
- **10/22/24:** Application Submission Due Date by Noon
- **12/09/24:** Evaluation Committee Meeting
- **12/16/24:** Evaluation Committee Meeting
- **12/18/24:** Announce Intent to Award
- **01/16/25:** Board Action to Award
- **01/17/25:** Post Award Notice
- **02/01/25:** Execute Amendments

APPLICATION SUBMISSION

- **Submission Due Date and Time**
 - October 22, 2024
 - 12:00 p.m. EST
 - **Late submissions will not be considered**

- **Delivery of Applications**
 - Must be submitted via email
 - Email address: RFP@jwbpinellas.org
 - Subject line: Capital RFA- [Applicant's Name]
 - Maximum email size: 10 MB
 - Send multiple emails if attachments exceed 10 MB

EMAIL SUBMISSION REQUIREMENTS

- Capital RFA - Application [Applicant Name].pdf
- Capital RFA - Form 3 - Budget [Applicant Name].xlsx
- Capital RFA - Form 4 - Vendor Quote Summary (Project 1) [Applicant Name].pdf
- Capital RFA - Form 4 - Vendor Quote Summary (Project 2, if applicable) [Applicant Name].pdf
- Capital RFA - Form 4 - Vendor Quote Summary (Project 3, if applicable) [Applicant Name].pdf

APPLICATION ASSEMBLY INSTRUCTIONS

- Signed Addenda, if issued
- Form 1- Application Signature Form (signed)
- Table of Contents
- Form 2-Project Narrative (Project 1)
 - Photos, drawings, and maps that support the project request
 - Proposed depreciation schedule (see Section 1.8), if applicable
 - Copy of your lease agreement (see Form 2, Req #2), if applicable
 - Construction Spend Rate Schedule (see Form 2, Req #6), if applicable
- Form 2 - Project Narratives for Projects 2 and 3, if applicable
- Form 5 - Contract Amendment Terms & Conditions Compliance Checklist
- Form 6 - Non-Operating and Capital Project Advance Request
 - Detailed Project Draw (Funding) Schedule, if applicable
- Form 6 - for Additional Projects 2 and 3, if applicable



FORM 3 - PROJECT BUDGET

FORM 3- NON-OPERATING AND CAPITAL PROJECT RFA BUDGET

Instructions: Each project request should include all items that need to be purchased for the project, regardless of the funding source.

Agency Name: Lorrayne Inc.

Project 1 Name	Project Item(s) Description	Item Quantity	Item Unit Price	Amount Requested from JWB	Amount From Other Revenue Sources	Total Item Cost	Name of Other Revenue Source	Vendor Selected
Computer Lab	HP Laptop Computers	8	\$725.00	\$5,800.00		\$ 5,800.00		DEF Company
	HP Desktop Computers	8	\$625.50	\$5,004.00		\$ 5,004.00		JKL Company
	Keyboards with mouse	16	\$125.00	\$2,000.00		\$ 2,000.00		Amazon
	Computer cables	16	\$25.00	\$400.00		\$ 400.00		Amazon
	Licenses for Uniquely Ours software	16	\$412.50	\$6,600.00		\$ 6,600.00		Uniquely Ours LLC
	HP Office Jet Pro Color Printers	16	\$406.25	\$6,500.00		\$ 6,500.00		VWX Company
	Computer chairs	16	\$199.00	\$0.00	\$3,184.00	\$ 3,184.00	Fundraising	Office Depot
	Computer desks	16	\$300.00	\$2,400.00	\$2,400.00	\$ 4,800.00	City of St. Petersburg	Office Depot
Total Project 1				\$28,704.00	\$5,584.00	\$34,288.00		

FORM 3 – PROJECT BUDGET

- Include all items for your project budget. For example, include warranties, keyboards, wires, etc. even if it will be paid for by another funding source.
- Don't forget to consider implementation costs for the project when developing your budget.



FORM 4 - VENDOR QUOTE SUMMARY

FORM 4 – VENDOR QUOTE SUMMARY

Agency Name: Lorraine Hayes Project Name: Computer Lab

Does your project contain any items with a total cost over \$5,000? Yes No

If yes, follow the instructions and complete the form below. If no, no additional information on form is required.

Instructions:

Items with a total cost of over \$5,000 must be summarized on this form and based upon three, current (quoted after 09/03/24), written quotations. The three written quotes must be attached to the form and assembled in the order of the Project Items and the order of the quotes listed below. A checkmark is to be placed in box next to the vendor selected for each item.

If there is only one source for the requested item or service, a written justification must be attached explaining the reason it is a sole source; or, if the agency was unable to get three current quotations for the requested item or service, a written explanation must be attached explaining the reason three current quotes were unable to be procured. In addition to the written justification/explanation, a current quote from the vendor(s) must also be attached.

Project Item(s)	Quote 1 Vendor Name/Cost	Quote 2 Vendor Name/Cost	Quote 3 Vendor Name/Cost	Comments
8 HP Laprop Computers	<input type="checkbox"/> ABC Company/ \$6392	<input checked="" type="checkbox"/> DEF Company/ \$5800	<input type="checkbox"/> GHI Company/ \$6242	3 Quotes Attached
8 HP Desktop Computers	<input checked="" type="checkbox"/> JKL Compan/ \$5800	<input type="checkbox"/> MNO Company/ \$5100	<input type="checkbox"/> Click or tap here to enter text.	Written Justification and 2 Quotes Attached
16 Licenses for "Uniquely Ours" Software	<input checked="" type="checkbox"/> Uniquely Ours LLC/ \$6600	<input type="checkbox"/> Click or tap here to enter text.	<input type="checkbox"/> Click or tap here to enter text.	Sole Source Justification and Quotes Attached
16 HP Office Jet Pro Color Printers	<input type="checkbox"/> PQR Company/ 5600	<input type="checkbox"/> STU Company/ \$7200	<input checked="" type="checkbox"/> VWX Company/\$6500	3 Quotes Attached
Click or tap here to enter text.	<input type="checkbox"/> Click or tap here to enter text.	<input type="checkbox"/> Click or tap here to enter text.	<input type="checkbox"/> Click or tap here to enter text.	Click or tap here to enter text.

FORM 4 - VENDOR QUOTE SUMMARY

- **Project Cost Requirements**
 - Only include items with a total cost over \$5,000
 - Attach three written quotes or written justification for sole source or insufficient quotes
 - Order the quotes by project items
 - Checkmark the selected vendor

FORM 5 - CONTRACT AMENDMENT TERMS & CONDITIONS COMPLIANCE CHECKLIST

#	Title	Comply	Exception	Not Comply	Not Applicable
1	Special Condition 1				
2	Special Condition 2				
3	Special Condition 3				
4	Special Condition 4				
5	If applicable, Special Condition 1				
6	If applicable, Special Condition 2				
7	If applicable, Special Condition 3				
8	If applicable, Special Condition 4				
9	If applicable, Special Condition 5				

- Compliance Options for Applicants
 - Comply: Full understanding and agreement
 - Exception: Must be fully explained
 - Not comply: Must be fully explained
 - Not Applicable: Special Conditions do not apply

- Instructions for Applicants
 - Mark the appropriate column for each term and condition
 - Refer to Attachment 2 for details



FORM 6 - NON-OPERATING AND CAPITAL PROJECTS ADVANCE REQUEST FORM

- **Advance Requirement**
 - Does the agency require an advance to complete the project?
 - Options: Yes or No
 - If No, the form process stops here

- **Advance Amount Needed**
 - Specify the advance amount required
 - Limited to the highest expected monthly expenditure
 - Must attach detailed project draw schedule that identifies expected monthly expenditures
 - Must agree to comply with Special Condition #8 on Form 5

MINIMUM CRITERIA

- Application received by due date and time
- Applicant currently **receives JWB program funding** and the Application is **for the benefit of a JWB-funded program**
- Applicant **not on a JWB Corrective Action or Performance Improvement Plan**
- One application per agency for **up to three capital projects**
- **IRS 501(c)(3)** designation at submission
- Signed by an authorized officer
- Capital project request minimum of \$10,000, **total not exceeding \$350,000**

ROUND 1 EVALUATION

<u>Evaluation Criteria</u>	<u>Points</u>
Statement of Need	40%
Project Description	30%
<u>Return on Investment</u>	<u>30%</u>
Total Potential Points	100%

ROUND 1 EVALUATION

- Must have an **average score of 65** or above to be considered
- **Geographic Distribution Consideration.** A high evaluation score does not guarantee that an Application will be funded. Applicants identify on Form 1 which program(s) their project(s) benefit and whether their program serves north-, mid-, south-county or is countywide.
- The Evaluation Committee makes funding recommendation to the Board for approval and award

ATTACHMENT 5 - ROUND 1 EVALUATION FORM

AGENCY NAME: _____
 PROJECT NAME: _____
 RFA TITLE: Non-Operating and Capital Projects

CRITERIA	(A) POTENTIAL POINTS	(B) WEIGHT	(C) INDIVIDUAL SCORE	(B) X (C)	TOTAL SCORE
Project Description	1 - 5	30%		6 x	
Statement of Need	1 - 5	40%		8 x	
Return on Investment	1 - 5	30%		6 x	
GRAND TOTAL		100%			

The Evaluation Committee must review the Applications independently. The Evaluation Committee then meets to discuss their independent review. Points are awarded according to the quality of the response with respect to each criterion.

POINT RANGE

1: Unacceptable

- No response provided or contains major error(s), omission(s), or deficiency(ies). None of these conditions can be corrected without a major rewrite.

2: Partially meets (significant gaps, compromise required)

- Minimally fulfills the described need.
- Shows only minimal understanding of the requirements. There exists an overall moderate or high degree of risk of the applicant not meeting the requirements.

3: Meets, with moderate gaps

- Generally fulfills the need with a few exceptions; some nuances or outlying aspects of the issue are unaddressed.

4: Meets, with minor gaps (no compromise required)

- Satisfies all requirements with adequate detail.
- Offers some significant strengths or numerous minor strengths that are not offset by weaknesses. There exists an overall low to moderate degree of risk of the applicant not meeting the requirements.

5: Fully meets or exceeds all requirements of the section

- Satisfies all requirements with extensive detail.
- Offers numerous significant strengths that are not offset by weaknesses. There exists an overall low degree of risk of the applicant not meeting the requirements.

■ Evaluation Process

- Committee reviews applications independently
- Committee meets to discuss independent reviews
- Points awarded based on response quality

■ Point Range Criteria

- 1: Unacceptable
- 2: Partially meets
- 3: Meets, with moderate gaps
- 4: Meets, with minor gaps
- 5: Fully meets or exceeds requirements

AWARD

- JWB's intent is to award up to **\$5.1 million**
- Multiple awards anticipated
- **Award amounts may differ from what was requested** based upon the dollars available
- **Notice of Intent to Award** posted on JWB's website within two business days after Evaluation Committee Decision
- **Notice of Award** posted on JWB's website and emailed to Applicants within two business days after Board decision

AGREEMENT

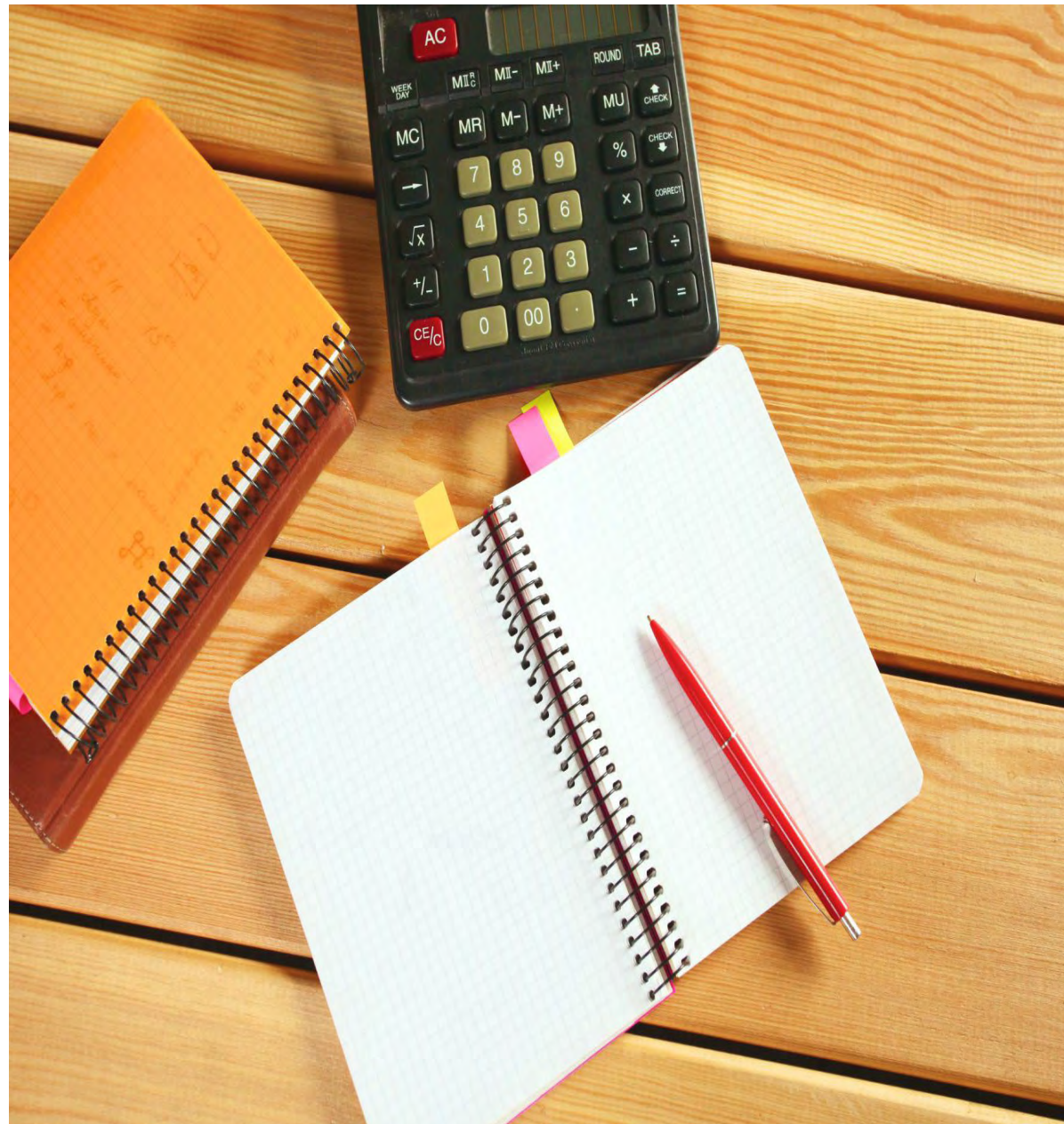
- Agreement Amendment
 - Initiated by JWB Sr. Program Consultants
 - Specifies maximum funds and purpose
 - Funds must be spent and project completed by termination date
- Extended Time Frame
 - Extensions may be granted to FY26, if Construction Spend Rate Schedule is attached, in response to question 6 showing project cannot be completed by 09/30/25

IMPORTANT POINTS

- All communication must be through Lorraine Hayes.
- Ensure that you read and respond to all questions and requirements of the RFA.
- Attachment 4-Application Checklist provided in RFA to assist Applicants.
- Do not exceed the 6 page limit for each project for Form 2-Narrative.

CONTACT INFORMATION

- Contact Information for RFA Queries
 - Directed to Lorraine Hayes
 - Email: rfp@jwbpinellas.org
 - Phone: 727-453-5654
- www.jwbpinellas.org
 - Questions & Responses
 - Any Addenda



IT Best Practices

Questions and Answers