



# CONTINUOUS IMPROVEMENT INITIATIVE GUIDELINES

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**2017-2018**

**OCTOBER 2017**



## What is the purpose of the Continuous Improvement Initiative?

Launched in February 2007, the Continuous Improvement Initiative (CII) was conceived as a way to build the capacity of agencies under contract with Children's Services Council (CSC) and United Way (UW). CII is in its twelfth year of funding and as of September 2017, almost \$2,000,000 has been made available to over 60 different agencies.

## Which agencies are eligible for funding?

- 1) CSC-funded nonprofit organizations, including those agencies that are subcontracted to provide services on behalf of CSC for any time period between FY October 1, 2017-September 30, 2018.
  - a) Afterschool and childcare providers that have achieved Emerging and Promising status through Strong Minds are eligible for funding through CII.
  - b) Afterschool and childcare providers receiving Tier 1 or Tier 2 reimbursements through Strong Minds are not eligible to participate in CII unless the agency is also funded by United Way.
- 2) United Way funded nonprofit organizations, who receive funding for any time period between October 1, 2017-September 30, 2018.

***Please note, United Way funds allocated for this initiative for FY 2017-2018 have been fully committed. Therefore, United Way partner agencies (with the exception of those receiving funding from CSC as noted above) are not eligible for funding at this time.***

## What can an agency receive funding for?

There are three categories of support available:

- 1) Organization Development Supports
- 2) Obtaining Agency Accreditation
- 3) Improving IT Infrastructure

Funding limits vary by category. Agencies may submit applications, during scheduled application cycles, for multiple categories during a twelve-month period; this is a rolling 12-month period which begins when an agency initially receives funding from CII. During a twelve-month period, each category can only be applied for once, even if the maximum funding amount is not received.

- 1) Organization Development Supports category requests are limited to \$10,000
- 2) Accreditation category requests are limited to \$10,000
- 3) IT Infrastructure category requests are limited to \$15,000

**NOTE:** Agencies with requests greater than the maximum funding amount for any category must provide narrative in question 4 of the application on how they will fund the difference. Agency will need to secure these additional funds within 3 months of the application's approval.

### **Ineligible Expenses**

The Continuous Improvement Initiative will not consider applications for items or services purchased prior to submission.

## **How can the funding be used in each category?**

### **ORGANIZATION DEVELOPMENT SUPPORTS**

Funding is available to support work in the areas of: strategic planning; board governance; organization restructuring; financial management; and human resource management. Funding request must align with the criteria below.

- 1) As funding is limited, CSC funded agencies must access the Grants to Reach Organizational Wellness (GROW) supports available through Nonprofits First prior to submitting an application for this category.
- 2) Agencies applying for funding in this category should submit an Action Plan, outlining the scope of services they are requesting support for and identifying who they anticipate using to deliver any needed consulting services, and the associated costs.
  - a) Two quotes are required for Organization Development Supports or an agency can submit a justification in the narrative section of question 4 on the application as to why they must use a specific consultant/vendor.

### **Ineligible Expenses**

- 3) Funding is not available to hire employees, provide staff incentives or support appreciation events.
- 4) Applications simply requesting \$10,000 for organization development supports will not be considered.

### **OBTAINING AGENCY ACCREDITATION**

Funding is available to support accreditation by Nonprofits First through one of the following two subcategories:

- 1) Support to obtain Agency Accreditation:  
Funding under this subcategory can be used for outside consultants to address areas of development as identified in the self-assessment; administrative support in preparing for the accreditation process; or for advanced technical assistance for agencies going through reaccreditation.

**NOTE:** Agencies requesting support to obtain Agency Accreditation must have first completed a self-assessment for the Agency Accreditation process and documentation of this must be on file with the application.

- 2) Cost of Agency Accreditation:  
Funding under this subcategory can be used to support the fee for Agency Accreditation. Requests are limited to the cost of agency accreditation.

Agencies and Subcontractors of CSC in good standing are eligible to apply for funding to support the full price of the Accreditation fee, if it is not already designated in their program budget.

**NOTE:** Providers requesting funding are strongly encouraged to apply in the first funding cycle (applications due by November 2, 2017) to ensure adequate time for review and approval prior to being billed by Nonprofits First.

### **Ineligible Expenses**

UW Partner agencies are not eligible to apply for the cost of Agency Accreditation.

### **IMPROVING IT INFRASTRUCTURE**

Funding is available to support the costs of hardware and software, including installation and training support. Funding request must align with the criteria below.

- 1) Agencies applying for funding in this category must submit one of the following with each request for IT Infrastructure:
  - a) a proposal from the proposed vendor with a technology assessment of the agency's infrastructure; OR
  - b) a copy of their formal Technology Plan. If the agency does not have a Technology Plan currently in place, the agency can utilize *Technology Plan* (see *Technology Plan Guidance and Template form on website*), to create a technology plan and meet this requirement.
- 2) A minimum of 2 quotes is required for any IT Infrastructure request (hardware, software and/or service) unless the quote provided is through a cooperative procurement agreement or state/federal purchasing contract (e.g., National Joint Powers Alliance (NJPA), State of Florida IT Contract, GSA Schedule, etc.). If the agency has a contract agreement with a specific IT vendor, comparable quotes still must be provided for hardware and software. Details must be provided in the narrative section of question 4 on the application.
- 3) IT Infrastructure hardware quotes must have comparable specifications. At a minimum, hardware specifications should include details listed in *Specifications & Resources* (see Appendix A - processor, RAM, hard drive, operating system, warranty, etc.)
- 4) Base specifications for hardware that CII will consider supporting are outlined in *Specifications & Resources* (see Appendix A). Equipment outside of those specifications can be requested if sufficient justification is provided as to business reason of why the deviation is necessary.
- 5) As software applications move to the cloud, CII will pay for the cost of the first year of an annual subscription and any conversion costs. Details must be provided in the narrative section of question 4 on the application describing how the agency will cover the cost of the annual subscription on an ongoing basis through means other than CII.
- 6) Requests to replace computers that have been purchased with CSC funds for use by funded program staff at select agencies may be supported through the Replacement Technology Program managed by Nonprofits First on behalf of CSC. If a position is funded by CSC at or above the 50%, they would not be eligible for CII but could be eligible through the Replacement Technology Program.

### **Ineligible Expenses**

- 7) Funding may not be used for website development, ongoing maintenance support from Nonprofits First or other technology vendor.
- 8) Funding may not be used to purchase consumables (USB flash drives, printer cartridges, etc.).
- 9) Information technology hardware solely for the use of clients will not be considered.

10) Computer hardware less than 5 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.

11) Computer monitors less than 10 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.

## How can an agency submit an application?

Applications are available for download at:

United Way of Palm Beach County [www.unitedwaypbc.org](http://www.unitedwaypbc.org)  
Children's Services Council of Palm Beach County [www.cscpbc.org](http://www.cscpbc.org)

Applications must be complete and include all requested information to be considered.

- 1) Completed and signed application cover page
- 2) Completed application questions
- 3) Applications for the following categories of assistance must also include the following:
  - a) Organization Development Supports: copy of Action Plan/Proposed Scope of Work and two quotes from vendors
  - b) Agency Accreditation: Nonprofits First invoice
  - c) IT Infrastructure: Technology Plan and two quotes from vendors

Application and all attachments must be submitted as a single PDF document and electronically sent to:

Tamara Worley, United Way of Palm Beach County at [TamaraWorley@UnitedWayPBC.org](mailto:TamaraWorley@UnitedWayPBC.org) with the following subject line: Continuous Improvement Initiative Application – [Name of Organization]

**NOTE:** Hard copy applications will no longer be accepted.

The CII Advisory Panel will review the applications and recommend funding. The panel will consist of representatives from CSC and UW. Applications will be reviewed multiple times during the year.

Applications must be submitted by the established deadlines to be considered during that funding period. The following deadlines have been established, contingent upon availability of funding:

November 2, 2017 ❖ February 1, 2018 ❖ May 3, 2018 ❖ August 2, 2018

## What documentation must be submitted after services have been rendered and the project is complete?

Following the delivery of services, the agency will be required to submit a *Project Completion Report* (See form on website) to United Way. The report also includes:

- a) a *Financial Reconciliation Statement* (See form on website)
- b) with attached financial reconciliation of funds from the vendor that the funds have been used as intended and described in the application. Examples of financial documentation include: invoices from vendor, copy of cancelled check made payable to the vendor, etc.

The *Project Completion Report* (See form on website) and the *Financial Reconciliation Statement* (See form on website) must be submitted to United Way no later than one year from the date of the award.

Any funds unexpended or unaccounted for must be returned to United Way. Please note that failure to submit the report by the due date could result in your agency having to return these funds and/or could affect future requests for funding under the Continuous Improvement Initiative.

**NOTE:** The grant may only be used for the purposes described in the approved application. Any deviation must be requested in writing and you must receive prior approval in writing from the Continuous Improvement Initiative Advisory Committee.

### ***Who can an agency contact with questions?***

For questions regarding the CII guidelines, application and/or reporting requirements, contact:

Tamara Worley  
Contracts & Initiatives Manager  
United Way of Palm Beach County  
Email: [TamaraWorley@UnitedWayPBC.org](mailto:TamaraWorley@UnitedWayPBC.org)  
Phone: (561) 375-6630

For questions regarding agency accreditation, CSC's Replacement Technology Program or GROW Program, contact:

Nonprofits First  
(561) 214-7435

# Appendix A

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## Specifications & Resources

### **BASE HARDWARE** (*Minimum Requirements*)

#### **Desktop:**

**Cost: Up to \$1200**

- Intel i5 Processor (or compatible i.e. AMD Phantom II)
- 4GB of RAM
- 128GB Solid State Drive (SSD)
- \*Windows 10 Pro
- 23" LCD or LED Wide Screen Monitor (or 17"/19" Standard diagonal display if preferred)
- 3 year warranty (up to 5 years is supported if cost effective)

#### **Laptop (Desktop replacement):**

**Cost: Up to \$1400**

- Intel i5 Processor (or compatible i.e. AMD Athlon II)
- 4GB of RAM
- 128GB Solid State Drive (SSD) – For staff who do not fall under HIPAA
- 128GB Self-Encrypting Solid State Drive (SED-SSD/OPAL) – For staff who access PHI, PII, and fall under HIPAA
- \*Windows 10 Pro
- 3 year warranty (up to 5 years and Accidental Damage is supported if cost effective)

**NOTE:** SED-SSD/OPAL drives require the TPM chipset to allow remote encryption to take place. BitLocker or a comparable encryption suite is required to remotely manage these drives

#### **Laptop (basic internet / presentations):**

**Cost: Up to \$800**

- Intel i3 Processor (or compatible i.e. AMD Athlon II)
- 4GB of RAM
- \*Windows 10 Pro
- 3 year warranty (up to 5 years and Accidental Damage is supported if cost effective)

#### **Approved Tablets:**

- 32GB Android Tablet
- 32GB Windows Mobile 8 Tablet
- 32GB iPad Tablet

**NOTE:** All other devices are subject to approval with proper justification



**2-in-1 Hybrid Laptop (Laptop and Tablet):**

***Cost: Up to \$2200 – Use case required***

- Intel i5 Processor (or compatible i.e. AMD Athlon II)
- 4GB of RAM
- 128GB Solid State Drive (SSD) – For staff who do not fall under HIPAA
- 128GB Self-Encrypting Solid State Drive (SED-SSD/OPAL) – For staff who access PHI, PII, and fall under HIPAA
- Windows 10 Pro
- 3 year warranty (up to 5 years and Accidental Damage is supported if cost effective)

**NOTE:** SED-SSD/OPAL drives require the TPM chipset to allow remote encryption to take place. Wave Cloud or a comparable encryption suite is required to remotely manage these drives

**\*Windows 7 is allowed if required by legacy applications but plan to upgrade to Windows 10 at current price is required.**

**ADDITIONAL NOTES**

- 1) Computer hardware less than 5 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.
- 2) Computer monitors less than 10 years old will not be replaced unless there is an issue. Details must be provided in the narrative section of question 1 on the application.
- 3) Hardware above the base specifications can be requested with full justification as to the business need and why the base model cannot meet the business requirement.

**SOFTWARE RESOURCES**

The following are resources available to non-profit organizations and agencies are strongly encouraged check these websites prior to submitting a CII request for IT Infrastructure:

- 1) Techsoup - <http://www.techsoup.org> - Provides a broad array of deeply discounted software for a small administrative fee. Some of the software available includes: Adobe, Microsoft, Intuit, Symantec, etc.
- 2) Microsoft Nonprofit Licensing - <https://www.microsoft.com/en-us/nonprofits> or <http://www.microsoft.com/nonprofit> - Provides every nonprofit resource that Microsoft offers through a single website. Some of the most exciting software products Microsoft offers for FREE includes: Microsoft Office 365 (online email suite), SharePoint (online collaboration), OneDrive (cloud storage for files), Skype for Business. Microsoft additionally offers many advanced products for 50% - 90% off MSRP retail pricing.
- 3) U.S. Communities - <http://www.uscommunities.org/nonprofit/> - Provides access to one of the largest cooperative purchasing initiatives for nonprofit agencies to leverage.