Financially Assisted Agencies FY 2026-2028 Economic Stability/Mobility Notice of Funding Opportunity Reviewer Orientation

April 2, 2025

Palm Beach County
Community Services Department

Overview

- I. Financially Assisted Agencies Program & NOFO Process –
 Michael Wright, Contract Manager
- II. FAA NOFO Guidance Michael Wright, Contract Manager
- III. Reviewer Responsibilities Natalie Vazquez, Sr. Program Manager
- IV. Proposal Review Process Michael Wright, Contract Manager
- V. SAMIS Elena Klimenko, Contracts/Grants Coordinator

I. Financially Assisted Agencies Program & NOFO Process Michael Wright, Contract Manager

Community Services Department FAA Objectives and Performance Measures

FAA Goal

To follow the Health and Human Services Element of the *Comprehensive Plan of Palm Beach County* goals and objectives and the recommendations of the Citizens Advisory Committee that address the availability of health and human services necessary to protect the health, safety and welfare of its residents, by providing funding to qualifying non-profit organizations to provide health and human services related to the approved service categories.

FAA Objectives

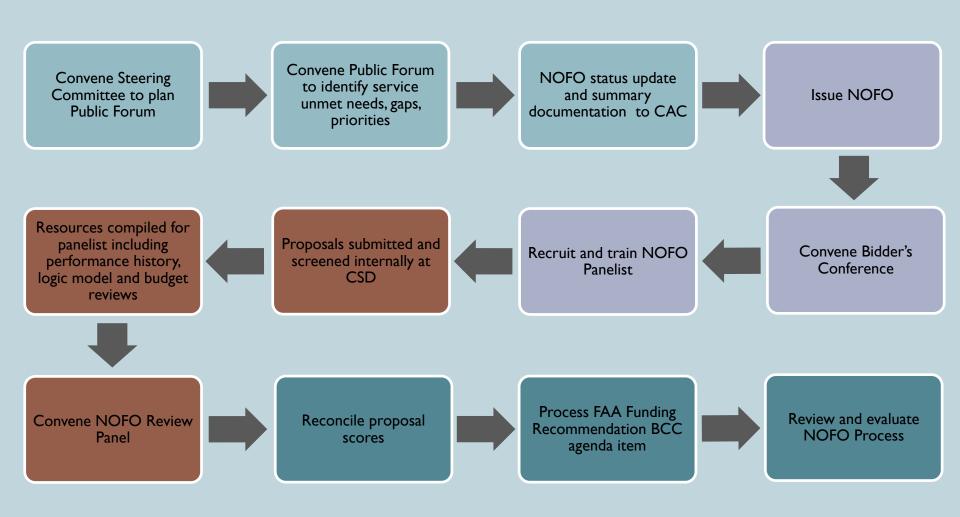
- CSD monitors, evaluates, and provides technical assistance to contracted providers to improve program effectiveness and performance.
- Enhance quality management activities to measure service quality and program effectiveness utilizing the newly implemented network of client databases.

FAA Performance Measures for FAA FY 2026-2028 ES NOFO

Expected outcomes are listed in the guidance document and will be discussed in detail later in the presentation.



FAA Planning Process



Funding Cycle

FY 2026-2028 NOFO Category:

Economic Stability/Mobility

<u>Service Categories:</u>

- 1. Economic Stability
- 2. Economic Mobility "With Children, "SOFI""
- 3. Self- Sufficiency "Without Children"
- 4. Continuous Quality Improvement

Subcategory:

Intellectual/Development Disabilities
Seniors

Oct 1, 2025 – Sept 30, 2028 FY 2026 – FY 2028

II. FAA NOFO Guidance - Michael Wright, Contract Manager

FINANCIALLY ASSISTED AGENCIES FY 2026 – FY 2028 ECONOMIC STABILITY/MOBILITY Notice of Funding Opportunity

TIMELINE

December 2024-January 2025	Stakeholder & Community Conversations	CSD & CAC/HHS
February 13, 2025	Citizens Advisory Committee on Health and Human Services (CAC/HHS) information update on the NOFO process	CSD CAC/HHS
March 10, 2025	NOFO/RFP available for the public	CSD
March 19, 2025	Technical Assistance Conference	CSD Applicants
March 26, 2025	Reviewer Training	CSD Reviewers
April 9, 2025	Final day to submit written questions 12:00 p.m. (Noon) EST	Applicants
April 10, 2025	NOFO Proposal submission deadline 12:00 p.m. (Noon) EST	Applicants
April 10, 2025	Cone of Silence Begins for FAA Economic Stability/Mobility Intellectual/Developmental Disabilities/Self-Sufficiency (SOFI) NOFO	CSD, Applicants, Reviewers, BCC
April 28, 2025	Strategy- Economic Stability Review Panel meets to review and score proposals	CSD Reviewers
April 29, 2025	Subcategory- Intellectual/Developmental Disabilities/Seniors Review Panel meets to review and score proposals	CSD Reviewers
April 30, 2025	Strategy- Economic Mobility/SOFI; Self-Sufficiency (Households without children) Review Panel meets to review and score proposals	CSD Reviewers Palm Beach C COMMUN SERVICE

FINANCIALLY ASSISTED AGENCIES FY 2026 – FY 2028 ECONOMIC STABILITY/MOBILITY Notice of Funding Opportunity TIMELINE

May 1, 2025	Staff reconciles review panel rankings and funding availability to develop recommended allocations	CSD
May 7, 2025	Funding Recommendations are posted on the FAA website	CSD CAC/HHS
May 8, 2025	CAC/HHS meeting presentation (scheduled if needed)	Applicants
May 17, 2025	Final date to file a Funding Grievance	Applicants
July 8, 2025	Presentation of FY 2026 funding recommendations to BCC	CSD BCC
September 16, 2025	BCC Contract Approval	CSD BCC
September 16, 2025	Cone of Silence Ends for FAA Economic Stability/Mobility	CSD, Applicants, Reviewers, BCC



CONE OF SILENCE

This NOFO includes a Cone of Silence. The Cone of Silence will apply from the date the NOFO is due, which is April 10, 2025, until the final FAA contracts are approved by the Board of County Commissioners.

Respondents are advised that the "Palm Beach County Lobbyist Registration Ordinance" (Ordinance), a copy of which can be accessed at: http://discover.pbcgov.org/legislativeaffairs/Pages/Lobbying_Regulations.aspx is in effect. The Respondent shall read and familiarize themselves with all of the provisions of said Ordinance, but for convenience, the provisions relating to the Cone of Silence have been summarized here.

"Cone of Silence" means a prohibition on any non-written communication regarding this NOFO between any Respondent or Respondent's representative and any County Commissioner or Commissioner's staff any member of a local governing body or the member's staff, a mayor or chief executive officer that is not a member of a local governing body or the mayor or chief executive officer's staff, or any employee authorized to act on behalf of the commission or local governing body to award a contract. A Respondent's representative shall include but not be limited to the Respondent's employee, partner, officer, director or consultant, lobbyist, or any, actual or potential subcontractor or consultant of the Respondent.

The Cone of Silence is in effect as of the submittal deadline. The provisions of this Ordinance shall not apply to oral communications at any public proceeding, including pre-bid conferences, oral presentations before selection committees, and contract negotiations during any public meeting. The Cone of Silence shall terminate at the time that the BCC awards or approves a contract, rejects all proposals or otherwise takes action, which ends the solicitation process.

Ethics Commission

If anyone has a question regarding ethics they should not be addressed to our department, but should be addressed directly with the Ethics Commission – http://www.palmbeachcountyethics.com/



SUNSHINE LAW

A NOFO Review Panel is subject to Florida's Sunshine Law because it is engaged in the formal governmental action of sorting through various proposals and scoring and/or ranking them. The NOFO Review Panel is engaged in a governmental decision-making function, in essence doing the work of the Board of County Commissioners.

Review Panels must meet to discuss proposals in the sunshine. This requires:

- Meeting is publicly noticed
- Meeting is recorded all comments concerning the scoring and/or ranking of proposals must be recorded. Do not discuss any aspect of the proposals when you are "off the record" such as during breaks or in private conversations with another Review Panel member
- Members of the public, including proposers, are afforded an opportunity for public comment, this is not a question and answer period
- Each proposal presented to the Review Panel must be scored by each member of the Panel, and generally Review Panel members will sign one scoresheet per proposal
- The proposals review will be an electronic process and all documents will be saved.
 Additional documents and notes taken for the scoring must be submitted to
 Community Services Department after the proposals are scored. These documents
 are public records subject to disclosure on request





Funding Available

FY 2026-2028 Allocation \$3,425,054 *

Strategy: Economic Stability -\$790,590

Economic Mobility - \$285,814

Self-Sufficiency - \$94,500

Subcategory: Intellectual/Developmental Disabilities – \$1,690,429 Seniors - \$563,721

Strategy: Continuous Quality Improvements Projects- **IF** funded, Agencies will receive up to 5% of the recommended award

* Funding availability/recommendations are subject to BCC approval

Proposal Components

1. Project Narrative: (25 points)

Description of client/population served

Description of Organization

Specific questions related to priority areas (questions I-L)

2. Evaluation Approach: (15 points)

Complete Logic Model – New ROMA Logic Model

Use of Program Evaluation

3. Prior Outcomes and Response to Community Data (10 points)

Discussion of Prior outcomes

Respond to Community Data

4. Data Management (10 points)

Quality data collection, data entry and reporting

Use of data to inform program changes

5. Partnerships, Resources and Collaboration: (20 points)

Relationship to larger system of care

Formal partnerships

Address need after funding ends

6. Budget: (20 points)

Follow directions in the budget template.

Unit cost service description and Unit cost of service.

7. **Scope of Work** No points assigned



APPLICATION Review Process

- CSD shall recruit FAA Review Panel members.
- Review Committee members shall be trained, as appropriate, and receive submitted applications.
- Applications shall be reviewed, discussed, scored, and ranked by the FAA Review Committee.
- Funding recommendations, based in part by the scoring and ranking, are submitted to the CAC/HHS for comments.
- Funding recommendations are posted to the FAA website
- Applicant(s) have ten (10) business days following posting of funding recommendations to file a grievance notice.
- Contract agreements based on the funding recommendations, are submitted to the BCC for final approval in September 2025.

Priority Area Score

The proposal's SCORE is reflective of how competitive the proposal is.

The Review Panel will rank all proposals based on how critical they deem the program is for the system of care.

The RANKING of the proposals is reflective of how imperative and critical the services are to ensure availability and access.

Ranking Guide and Process

- Please review the ranking guides in the NOFO for each of the categories.
- There is a separate guide for Economic Stability, Self Sufficiency and Intellectual/Developmental Disabilities
- Each application will be scored and ranked.
- The proposals considered the most critical to the system of care will be ranked #1. All proposals will be ranked.
- No two proposals will be ranked the same, as in a tie.
- If there are 10 proposals, then the ranking should ultimately have 10 proposals ranked 1 through 10, with 1 being deemed the most critical.



Resource Documents

Data Sources

- Economic Framework
- Self-Sufficiency Continuum
- AMI Chart
- County Self-Sufficiency Matrix

Documents will be provided and can found here:

https://discover.pbcgov.org/communityservices/financiallyassisted/Pages/RFP.aspx

Economic Stability Recommendations

Economic Stability

Target Population: Households with or without children earning up to 50% Area Median Income (AMI) with a prioritization for up to 30% AMI

Required Outcomes (by sub-category):

Emergency Financial Assistance (Rental Assistance, Utility Assistance, Childcare Assistance, Transportation Voucher Assistance)	% of eligible clients will have their crisis resolved through emergency financial assistance up to 45 days from completed intake.
Safety Net Navigation & Linkage Services (SNAP Application Assistance, Medicaid Application Assistance, Unemployment Application Assistance)	% of clients will be successfully linked to safety net services within 7 days from program intake.
	% of clients will be satisfied with the linkage to services as evidenced by a customer service survey after services are rendered.
Temporary Employment/Apprenticeship Services	% of clients will be successfully connected to the employment services within the fiscal year.
	% of clients who obtained employment with a living wage or higher at the temporary employment/apprenticeship service.



Economic Stability Recommendations

Economic Stability

Target Population: Households with or without children earning up to 50% Area Median Income (AMI) with a prioritization for up to 30% AMI

Required Outcomes (by sub-category):

Legal Services	% of households who prevented eviction during the fiscal year
Tax Preparation Services	% of households who Earned Income Tax Credit (EITC) at the time of service.
	% of households who Claimed Child Tax Credit at the time of service.



Economic Mobility Sub-Category

Economic Mobility - Securing Our Future Initiative (SOFI)

Target Population: Households with children earning up to 50% Area Median Income (AMI) with a prioritization for up to 30% AMI

Required Outcome (by sub-category):

Potential Services:	Required Outcomes
 Case Management Job Training and Employment Services Vocational Training Financial Literacy Legal Services Job Development and Placement 	% of clients will increase their self-sufficiency in at least one or more categories such as family stability, well-being, financial management, education & training, and employment & Career, income domains as evidenced by I point on the self-sufficiency matrix quarterly.
 Open Tables® Apprenticeship Programs Self-Sufficiency Workshops Wrap-around supportive services only in combination with other self-sufficiency services listed above 	% of clients will obtain, maintain or better employment as evidenced by the employment assessments quarterly.
	% of clients will increase their household income as evidence on the financial assessment at program entry and exit.



Self-Sufficiency Sub-Category

Economic Mobility - Self-Sufficiency

Target Population: Households with no children earning up to 50% Area Median Income (AMI) with a prioritization for up to 30% AMI

Required Outcome (by sub-category):

Potential Services:	Required Outcomes (Agency may choose at least I based on program)
 Case Management Job Training and Employment Services Vocational Training Financial Literacy Legal Services Job Development and Placement Open Tables® Apprenticeship Programs Self-Sufficiency Workshops Wrap-around supportive services only in combination with other self-sufficiency services listed above 	% of clients will increase their self-sufficiency in at least one or more categories such as family stability, well-being, financial management, education & training, and employment & Career, income domains as evidenced by I point on the self-sufficiency matrix quarterly.
	% of clients will obtain, maintain or better employment as evidenced by the employment assessments quarterly.
	% of clients will increase their household income as evidence on the financial assessment at program entry and exit.



Intellectual Development Disabilities Sub-Category

Intellectual Development Disability

Target Population: Households with no children earning up to 50% Area Median Income (AMI) with a prioritization for up to 30% AMI

Required Outcome (by sub-category):

Respite for Caregivers

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Potential Services	Required Outcomes	
Emergency Financial Assistance (Rental Assistance, Utility Assistance, Childcare Assistance, Transportation Voucher Assistance)	% of eligible clients will have their crisis resolved through emergency financial assistance up to 45 days from completed intake.	
Safety Net Navigation & Linkage Services (SNAP Application Assistance, Medicaid Application Assistance, Unemployment Application Assistance)	% of clients will be successfully linked to safety net services within 7 days from program intake.	
	% of clients will be satisfied with the linkage to services as evidenced by a customer service survey after services are rendered.	
Case Management	% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year.	
Supported Employment Services/Career Planning/center-based employment training	% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year.	
	% of individuals will maintain or increase their self-sufficiency in one (I) or more categories such as transportation, childcare, housing, employment, income, and education, as measured on the self-sufficiency matrix	
Life Skills (Financial Literacy/Computer Skills Training/ Employment Skills Training)	% of individuals will achieve at least two (2) objectives on the Individualized Implementation Plan within the fiscal year.	
Day Programming		
Supported Living Services		
Retirement Services		



Seniors Sub-Category

Seniors

Target Population: Households with children earning up to 50% Area Median Income (AMI) with a prioritization for up to 30% AMI

Required Outcome (by sub-category):

Potential Services	Required Outcomes
Adult Day Care Services	% of seniors with Dementia, Alzheimer's, or cognitive-related conditions served will delay or eliminate the need for nursing home placement
Caregiver Services	% of individual caregivers who improve or maintain home-based care for a senior with Dementia, Alzheimer's, or cognitive-related conditions

^{*}Applications focusing on the "Recommended Focus Areas" will be given priority



Continuous Quality Improvement Recommendations

All agencies are required to propose a Continuous Quality Improvement Project.

The project could focus on:

- Enhancing programmatic services/outcomes;
- Improving data management practices



REQUIREMENTS

Client Management Information System (CMIS) All agencies awarded FAA funds must participate in CMIS. All clients served with FAA funds must be entered into CMIS. Funding requires that all clients served be entered and exited in CMIS during the applicable fiscal year. Agencies must execute the required partner and user agreements with Palm Beach County and must participate in the data sharing of CMIS on an ongoing basis throughout the term of their FAA contract in order to maintain eligibility for reimbursement.

Non Profits First Certification-County recognizes the certification process for nonprofit agencies through Nonprofits First: www.nonprofitsfirst.com. Non-Profits First Certification may be exempt for agencies that provide documentation of certification from another funding or oversight body recognized by their industry or if their agency has received two (2) consecutive monitoring reports from FAA with no findings. Exemptions must be requested and approved by the Department of Community Services each contract year. Requests for exemption must be indicated in the proposal Cover Page- Non Profits First section. All non-exempted agencies contracting with the County will be required to maintain certification or be certified within 18 months of their initial contract date.



III. Reviewer Responsibilities – Natalie Vazquez, Sr. Program Manager

Reviewing Proposals

- Conflict of Interest
 - Report any conflicts of interest.
 - Properly complete, sign, and return conflict of interest.
- Review the Resource Documents
- Read and Understand Evaluation Criteria
- Read Proposals
- Analyze the Contents of the Proposals
- Determine Strengths and Weaknesses
- Do Not Discuss your Proposals with other Review Panel and/or CAC Members

Reviewing Proposals

- Highlight/note language that aligns with criteria in the proposal guidance.
- Review budget, attachments, and other supporting documentation.
- Evaluate proposals independently on its own merit against the evaluation criteria only.
- Please review all assigned proposals prior to the review panel and complete the Comment Form.
- The Comment Form will be part of the Public Record.
- Mease do not score proposal until after the panel discussion meeting.
- Applications must be considered in a manner that is:
 - Complete
 - Fair
 - Objective
- **Review Comment Writing Guide.**

Evaluative Feedback

Use "evaluative" feedback in the discussion.

Evaluative feedback during the panel discussion that provides value, worth, or quality of the information in the application.

Evaluative feedback is important.

- Make This assists staff in the funding process.
- It serves as technical assistance to applicants future proposals.
- Recordings of this meeting will be online for applicants to listen to and they will use information that you provide when developing future proposals.

Participation

- Reviewer etiquette should be respectful, sensitive and tactful.
- Contribute to review discussions of each proposal's strengths and weaknesses.
- Be ready to discuss each proposal fully.
- Be mindful of the time allocated for the discussion.
- Try not to over-discuss a proposal to the detriment of the other proposals.
- Each reviewer is required to stay for the whole panel review meeting.

IV. Proposal Review Process –Michael Wright, Contract Manager

Review Process Summary

- Proposal eligibility requirements are reviewed internally by Department staff.
- Eligible proposals are assigned to Reviewers in SAMIS.
- Proposals are reviewed by the panelists.
- Brief presentation by Fiscal Staff and Evaluation Staff.
- Panels convene and score proposals.
- Once all proposals are scored, the proposals are ranked.
- The recording of the Panel reviews are posted online for several years.

Eligibility Requirements

All proposals were reviewed for the following Eligibility Requirements prior to making them accessible to you.

The Eligibility Requirements include:

- The proposal was submitted in SAMIS no later than April 10th at 12:00 p.m.
- Applicants are a registered Florida non-profit entity, verified in Sunbiz, provided services for 6 months.
- Proposed/recommended award cannot exceed 25% of Agency's total budget

Reviewing Budgets - Tips

- Proposed budget items should be detailed.
- ✓ Don't "3 employees......\$75,000"
- ✓ Do Specific positions and roles, what they do for the program, and how funds are allocated to pay for each
- ✓ Don't "supplies" or "consultants"
- ✓ Do detailed list of supplies and what they will be used for
- Other funding sources should be listed
- Confirmed or pending,- how much of the program is funding requested for?
- ✓ Weight should be given to programs with other community resources being used. If FAA is the only funder should be examined more closely. Being the only funder is not necessarily something to deduct points for but it should be examined and questioned

Reviewing Budgets - Tips

 Some agencies may put the 3 years total in the budget instead of 1 year. This is fine, it just should be considered in discussions to ensure consistency.

Comment Form Guide Review

- Use it to take notes
- As a tool for discussion during panel
- To remember criteria for scoring

Score Sheet Review

- Department staff will guide the review process, and will try to keep review of proposals to 20 minutes each.
- Please come prepared with your questions/comments.
- All notes and score sheets will be turned in and are subject to public record requests.

Ranking Guide

FAA NOFO FY26 Ranking Guide for Review Panelist

- As stated in the FAA NOFO Guidance FY26 all scored proposals will be ranked within their respective sub-categories. The Guidance states the following: The Review Panel will rank all proposals based on how critical they deem the program is for the system of care. The SCORE awarded to a proposal is reflective of how competitive the proposal is. The RANKING of the proposals is reflective of how imperative and critical the services are to ensure availability and access.
- The following data and information should be considered when ranking the proposals. This is to serve as a guide to ensure the ranking decisions are data driven.
- The proposal considered the most critical to the system of care will be ranked #1.All proposals shall be ranked.
- No two proposals shall be ranked the same, as a tie. If there are 10 proposals, then the ranking should ultimately have 10 proposals ranked 1 through 10, with 1 being deemed the most critical.

Ranking Guide – Economic Stability- Intellectual/ Development Disabilities

Funding priorities for the FY 2026-2028 NOFO are ranked in order of priority below:

Economic Stability- Intellectual/Developmental Disabilities

 Priority #I: Programs that propose to serve individuals with Intellectual/Developmental Disabilities to promote independence through community based services that increase life skills and provide support services.

Tie Breaker: Rank in order of services most critical to the system of care for those with Intellectual/Developmental Disabilities

Ranking Guide – Seniors

Funding priorities for the FY 2026-2028 NOFO are ranked in order of priority below:

Economic Stability- Seniors

- Priority #I:Adult Day Care Services
- Priority #2: Caregiver Services

Tie Breaker: Rank in order of services most critical to the system of care for those serving Seniors

Ranking Guide- Securing Our Future Initiative SOFI

Securing Our Future Initiative - Households with at least one child 0-17

Funding priorities for the FY 2026-2028 NOFO are ranked in order of priority below:

Economic Self-Sufficiency - Securing Our Future Initiative (SOFI)

- Priority #1: Agencies that propose a three-year case management project in high-priority zip codes: 33476, 33438, 33403, 33430, 33493, 33407, 33404, 33460. (must be evident in the proposal and budget)
- Priority #2: Proposes the use of Open Tables®.
- Priority #3: Agencies that propose a two-year case management project: in high-priority zip codes: 33476, 33438, 33403, 33430, 33493, 33407, 33404, 33460. (must be evident in the proposal and budget)
- Priority #4: Agencies that propose a one-year case management project: in high-priority zip codes: 33476, 33438, 33403, 33430, 33493, 33407, 33404, 33460. (must be evident in the proposal and budget)

Ranking Guide – Self-Sufficiency

Self Sufficiency - Adult households without children

Funding priorities for the FY 2026-2028 NOFO are ranked in order of priority below:

Economic Self Sufficiency - (Only individuals and households without children)

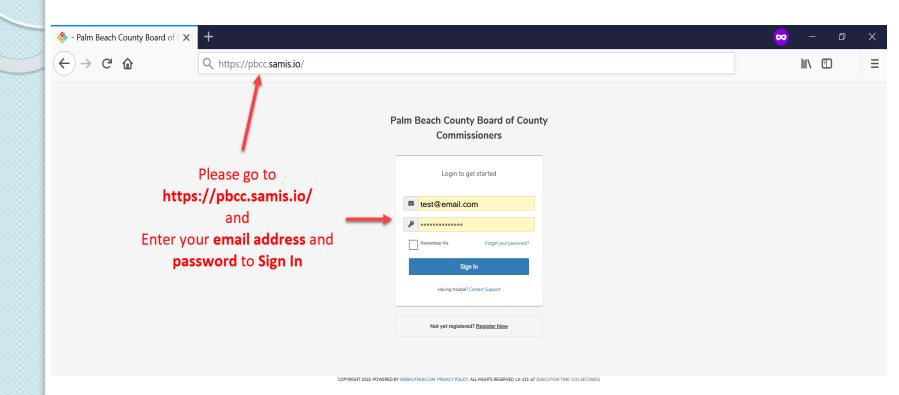
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- Priority #3: Agencies that propose a one-year case management project: in high-priority zip codes: 33476, 33438, 33403, 33430, 33493, 33407, 33404, 33460. (must be evident in the proposal and budget)

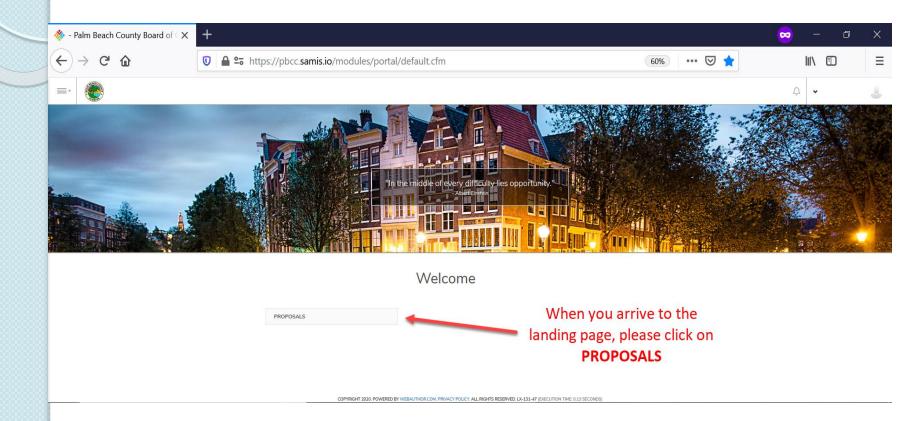
V. HOW TO REVIEW PROPOSAL SUBMISSIONS IN SAMIS (WEBAUTHOR) –

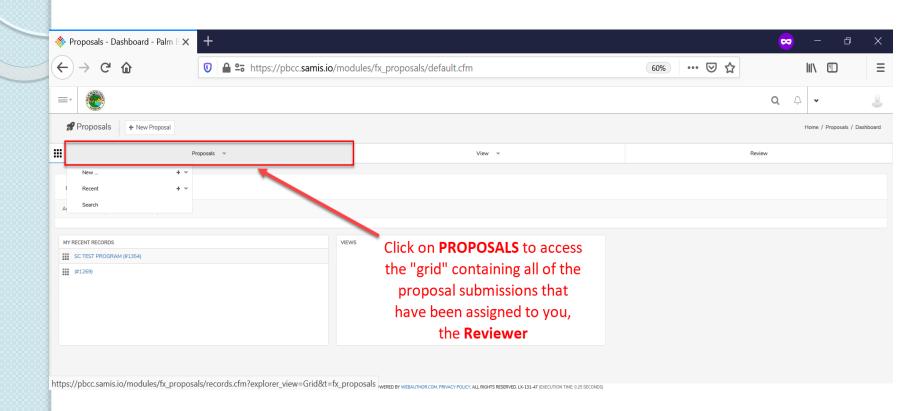
Elena Klimenko, Contracts/Grants Coordinator



If you need assistance with the system, please contact Elcana Dantzler, Contracts/Grants Coordinator at edantzler@pbc.gov

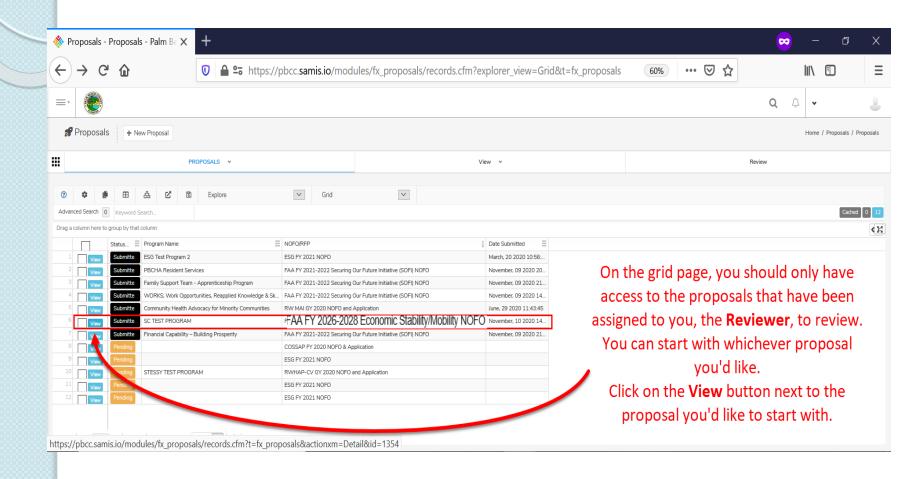


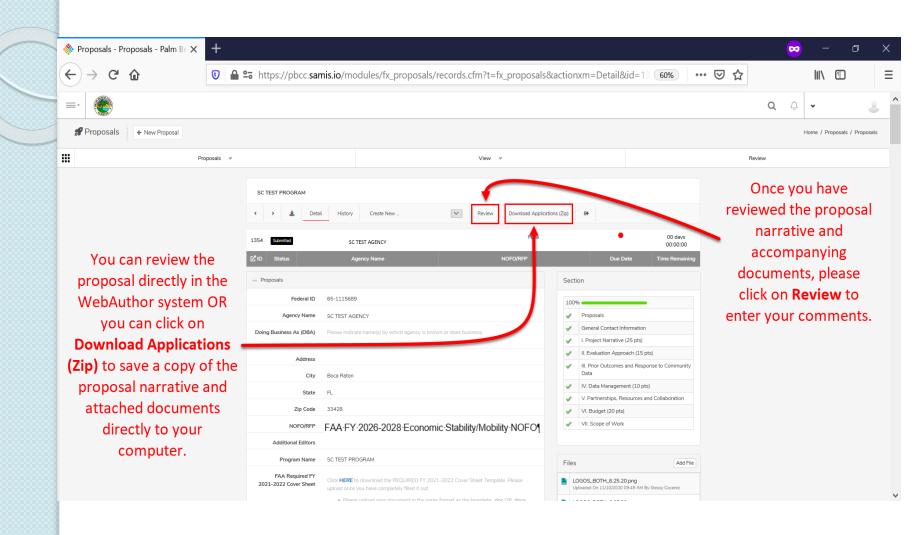


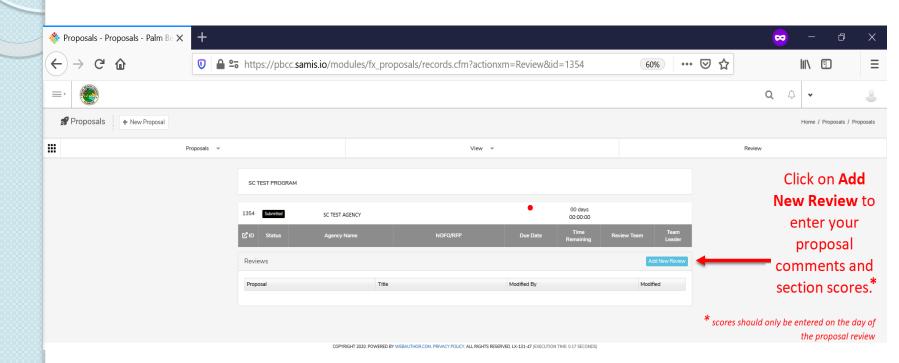


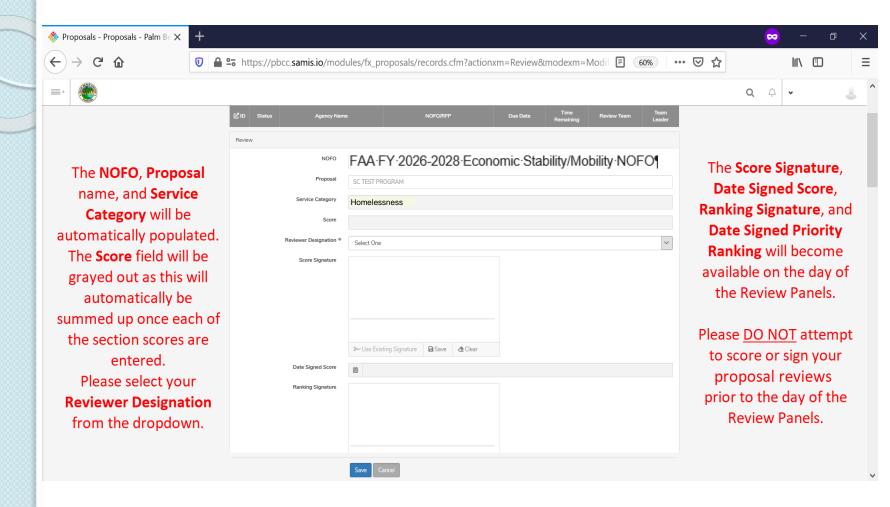
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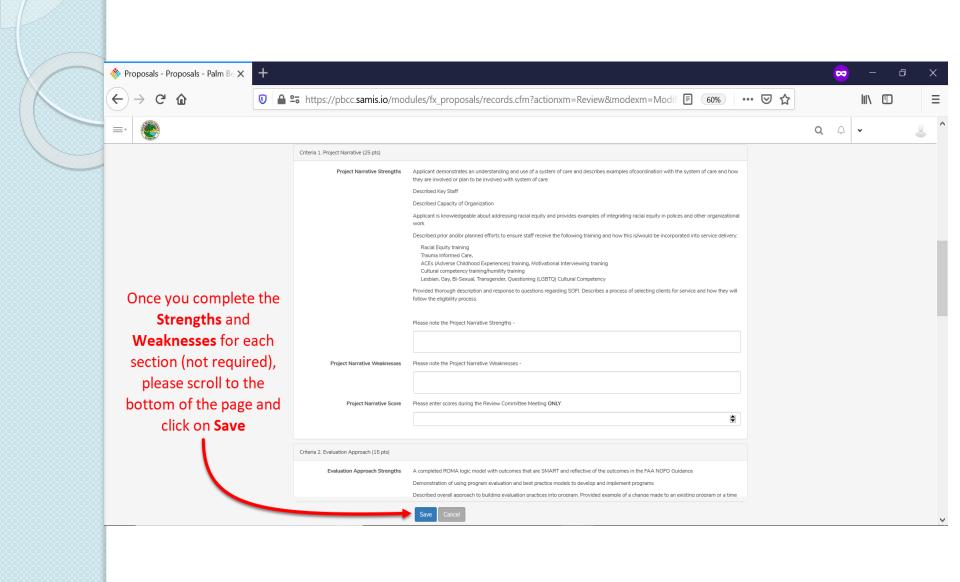


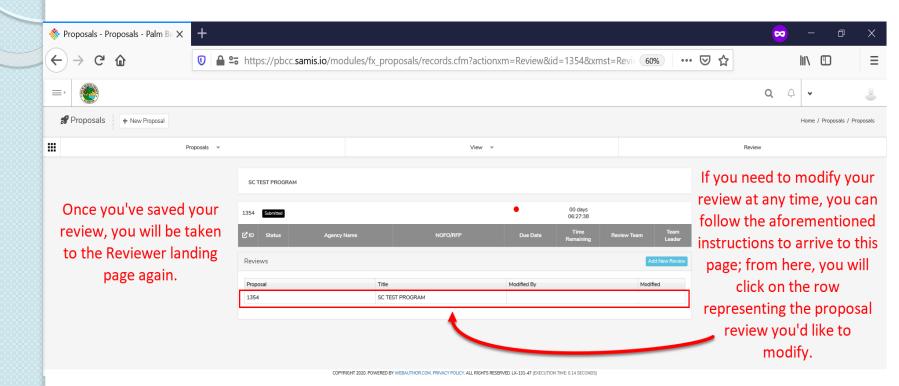


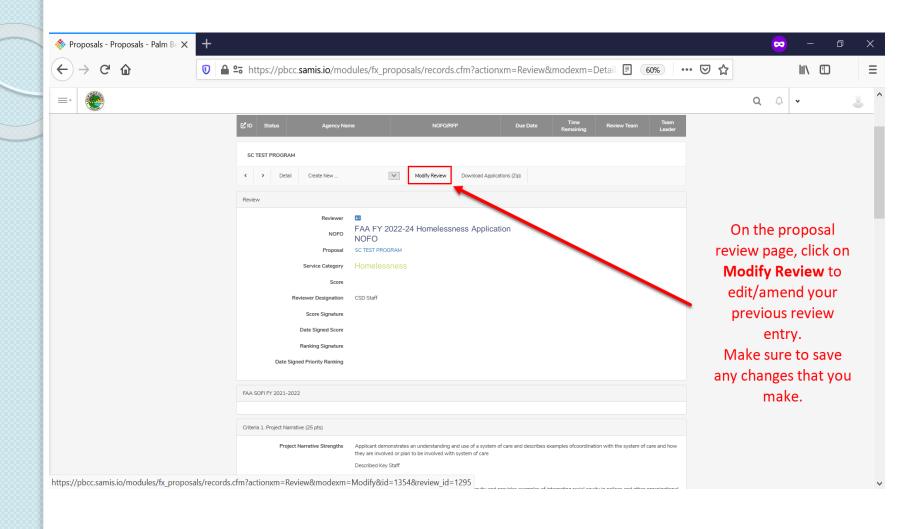












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