

Regular Meeting 9/13/01

**TO:** Juvenile Welfare Board Members

**FROM:** James E. Mills, Executive Director *jm*  
Lisa A. Sahulka, Director, Programs & Finance *LS*

**Narrative**

The Board has indicated the desire to revise the procedures governing the JWB Request for Proposal (RFP) process.

Discussion at previous meetings and workshops has indicated the Board's desire to:

1. Review the RFP application and rating sheet before it is released.
2. Create a capability to notify agencies when mandatory documents have not been included with the application to provide agencies a period of time to submit these required materials.
3. Provide additional time to the Board to review funding recommendations prior to Board meetings.

Staff has addressed these concerns by allocating additional time for the process; incorporating a process to notify agencies of missing mandatory documents; and providing an opportunity for the Board to review and edit the RFP before it is released.

As part of the revised procedures, attached please find the proposed RFP for the joint Equipment and Renovation process sponsored by JWB, United Way and the Pinellas County Community Foundation. This draft has been prepared jointly by United Way and JWB staff.

Staff is requesting the Board review the document and return any proposed edits by September 24, 2001.

Staff will submit a final recommended RFP to the Board in October to maintain the established schedule for awards at the December meeting. Staff is preparing for a separate workshop to address the RFP content and process for the New & Expanded funding cycle.

**DRAFT**

**Juvenile Welfare Board of Pinellas County**

**Pinellas County Community Foundation**

**United Way of Pinellas County**

**Equipment And Renovation  
Application Guidelines and Forms**

**Due Date:  
November 29, 2001  
4:00 pm**

**Number of Copies Requested  
5**

**Juvenile Welfare Board of Pinellas County  
Programs & Finance Department  
6698 68<sup>th</sup> Avenue North, Suite A  
Pinellas Park, FL 33781-5060  
Telephone: (727) 547-5600**

**United Way of Pinellas County  
18401 US Highway 19 North  
Clearwater, FL 33764-1739  
Telephone: (727) 535-3545**

## Equipment And Renovation RFP Information Fiscal Year 2001-2002

### 1. Introduction

This solicitation process is designed to fund purchases for equipment, renovations, computer and technology needs that cannot be purchased by agencies that maintain facilities in Pinellas County, or provide human services to Pinellas County residents. Agencies who respond to this RFP are strongly encouraged to request only necessary items to allow as many agencies as possible to receive funding. This document contains all the information and guidelines necessary to apply for these funds.

The application process is a joint effort between Juvenile Welfare Board (JWB), Pinellas County Community Foundation (PCCF), and United Way of Pinellas County (UW). The partnership between JWB, PCCF, and UW will leverage financial and human resources available to community agencies. JWB and UW will jointly review all proposals. The JWB is an independent special taxing district created to plan, fund, and coordinate social services for children in Pinellas County, Florida. The UW is a not-for-profit organization, which raises funds in the community to enhance services to persons living in Pinellas County, FL.

Eligible applicants must be governmental agencies, a private not-for-profit corporation, a current 501 (c) (3) or proof of application with the State of Florida for a 501 (c) (3). JWB or UW will enter into a written agreement with the successful applicant, which will specify the maximum funds allocated and available, and the products and/or services to be purchased.

All agreements resulting from this solicitation will be concluded following a review of all applications. All applications will be opened and publicly recorded immediately following the submission deadline. The competitive process includes the following timetable:

### 2. Application Timetable

Activity	Time	Date
Applications available at JWB and UW	8:00 am	October 22nd, 2001
Bidders Conference at UW	8:30 am	TBA
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Recommendations Mailed		TBA
Juvenile Welfare Board of Directors Action		January 10, 2002
United Way Board of Directors Action		January 24 <sup>th</sup> , 2002
Funding Effective Date		January 10, 2002-JWB January 24 <sup>th</sup> , 2002- UW

**Equipment And Renovation RFP Information**  
**Fiscal Year 2001-2002**

3. **Total Dollars Available: \$415,000.** The total dollars available for this RFP is \$415,000, which has been distributed as detailed below. Agencies may submit a total of two applications, one for Equipment and Renovations, one for Technology. The total funding requested for these two applications may not exceed \$25,000 per agency. Agencies may request between \$750-\$12,500 per application.

4.

<b>JWB Amount Available and Eligibility</b>	<b>UW Amount Available and Eligibility</b>	<b>PCCF Amount Available and Eligibility</b>
\$250,000 for Equipment & Renovations; Computers and Technology	\$100,000 for Computers and Technology \$50,000 for Equipment & Renovations	\$15,000 for Equipment & Renovations; Computers and Technology

**5. Response Date**

All proposals must be received not later than 4:00 pm (JWB or UW clock as appropriate), on November 29<sup>th</sup>, 2001. No applications will be accepted after 4:00 pm on the due date. Applications may not be faxed or e-mailed.

**6. Locations for Submission and Contacts**

Pamela Needham, Senior Analyst  
Juvenile Welfare Board  
6698 68<sup>th</sup> Avenue North  
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(727) 547-5650

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JWB, UW, and PCCF reserve the right to reject any or all applications, to waive any non-substantive deficiency or irregularity, and to award a contract in what they believe to be in the best interest of JWB, UW, PCCF, and Pinellas County.

The JWB and UW staff will be available for questions on the applications by phone from date of release to November 23<sup>rd</sup>, 2001.

JWB staff will be available at the Juvenile Welfare Board office from 8:00 to 4:30 pm November 26-28<sup>th</sup>, 2001 to review any applications prior to submission. Staff will review applications for completeness to determine that all required documents have been submitted. Staff will not review content of any responses or give any preliminary feedback on ratings. This will be on a first come first served basis.

## Equipment And Renovation RFP Information Fiscal Year 2001-2002

### 7. Funding Requests Guidelines:

The Juvenile Welfare Board, United Way of Pinellas County, and Pinellas County Community Foundation have adopted the following guidelines for the purchase of capital, non-capital equipment, and facility renovations.

- a) Individual Items must be greater than \$200. (Note: if you are purchasing the same item in bulk, the total for all the items must be greater than \$200. An example of an eligible request, you are purchasing identical tables at \$55.00, your total is \$220. ) Agencies may only request up to \$25,000 total in this process. Agencies may request between \$750-\$12,500 per application with a total of two applications per agency. Agencies can submit a maximum of one application for each target area: one for equipment & renovations and one for computer & technology.
- b) All responses must be submitted on the application forms provided.
- c) Answers must be responded to in the provided space and the font should be no less than 11 point.

### 8. Capital Purchase Guidelines

- a) Lease-purchase agreements are not considered capital expenditures and are not eligible for this RFP.
- b) Purchases of vehicles and real estate are not eligible for funding.
- c) Priority will be given to requests for building or site improvements as follows:
  - Code Violations
  - To meet Section 504 handicap standards.
  - To increase safety of public, clients or staff.
- d) Equipment purchased will be considered the inventory of the provider. Equipment purchased will be accounted for and controlled by the provider. Inventory reports shall be available to JWB, UW, and PCCF upon request. JWB, UW, and PCCF may physically inspect equipment at their discretion.
- e) Once equipment is fully depreciated it becomes the property of the provider. JWB, UW, and PCCF will accept the depreciation schedule of the provider's auditor.
- f) Equipment reverts to the ownership of JWB, UW and PCCF, if the program for which it was purchased is discontinued and the equipment is not fully depreciated.
- g) Equipment purchased with monies from more than one funding source will revert to the ownership of those sources in the same percentage as funded, if the program for which it was purchased is discontinued and the equipment is not fully depreciated.

### 9. Non-Capital Purchase Guidelines

Office supplies, agricultural, laboratory, cleaning and sanitation, household and institutional supplies, supplies used in maintenance and small repairs, chemical drugs and medicines, and other supplies and materials that are routinely operational in nature, are not eligible expenditures under this fund.

## Equipment And Renovation RFP Information Fiscal Year 2001-2002

### 10. Special Guidelines for Taxing Authorities

If the applicant is a governmental entity with taxing authority, written confirmation from the Chief Administrative Officer or elected official that there has been a presentation and formal review of the capability of the governmental unit to fund the item and that the funding is not available. Attachment A must be completed and submitted with the application.

### 11. Special Guidelines for Non-JWB and Non-UW Agencies

Non-JWB or non-UW funded agencies must attach a copy of the most recent audit report. If the audit report is more than 16 months old, you must also provide the most recently completed financial statements. (Note: If an audit has not been completed, please provide year-to-date Financial Statements, to include the most recent month's financial statement.

### 12. General Conditions for All Applicants

- a) The JWB, UW, and PCCF reserve the right to waive any of the stated guidelines where warranted by special circumstances.
- b) JWB, UW, and PCCF will not reimburse purchases, which vary from the approved request without prior approval.
- c) The use of JWB, UW, and PCCF funds under this agreement will not supplant any other funding currently under contract or otherwise previously appropriated.
- d) The applicant must provide five (5) copies of each application. (One original and four copies). Original must be clearly marked as such.
- e) An official authorized to bind the organization to the proposed activity must sign the application.
- f) Only submit the forms applicable to your agency's request. Do not include instruction pages.

### 13. Selection Criteria

- a) Applications will be evaluated using the Application Rating Scale. In addition to the rating scale, the following criteria will be applied to all applications.
  - Compliance with JWB, UW, and PCCF Board Policy and Guidelines outlined in this document.
  - Clarity, accuracy and completeness of the application.
  - Extent to which the requested expenditures will improve the quality of services or significantly improve the efficient delivery of services to residents of Pinellas County.
- b) Priority consideration for funding will be given to requests from programs that are already receiving current JWB, UW, or PCCF funding.
- c) All JWB & UW funded agencies must be in full contract compliance to be eligible for Equipment & Renovation funding.

## Equipment And Renovation RFP Information Fiscal Year 2001-2002

### 14. Definitions of RFP Terms

- a) **Equipment:** Items necessary to efficiently operate a program.
- b) **Renovations:** Enhancements of a facility through remodeling or repairing. Priorities will be given to requests consistent with Section 7c.
- c) **Capital expenditures:** Equipment or renovation expenditures valued at \$750 or more with a useful life of one year or more. Examples include large appliances, lawnmowers, etc.
- d) **Human Services:** Health, social services, education and developmental programs and activities designed to enhance people's development and well-being.
- e) **Non-Capital Expenditures:** Items valued between \$200 and \$750.
- f) **Financial Statements:** The required financial statements are a balance sheet, income statement, and statement of changes in financial position. They may be combined with a supplementary statement to depict the financial status or performance of the organization.

### 15. Helpful Hints

- a) **Attend the Bidder's Conference** – This conference is held to “walk through” the application process, allow potential applicants to ask questions, and clarify the process. Oftentimes, a participant will ask a question that inadvertently assists other participants. This opportunity is provided to ensure clarity on the forms and requests.
- b) **Assume the Reviewer is Not Familiar With Your Agency or Program** – In describing your request, be thorough and write in a manner that someone who is not familiar with your program will fully understand why you are requesting funds. This also applies in the section describing impact for clients or the potential improvement in efficiency.  
**Example:**

- Agency ABC operates a transitional housing program consisting of 12 mobile homes situated in a mobile home park, which are used to house homeless families for a 6 to 8 month period, depending on the need of each family. Parents are required to be enrolled in educational programs to help enhance their chances of success in reaching self-sufficiency and ending the cycle of homelessness.
- A playground area has been established in the mobile home park but lacks sufficient equipment. Funds are needed to purchase durable playground equipment for the children.
- A mowing tractor is also needed to provide the maintenance for lawn up-keep in the playground and surrounding areas of the park. The property is located near a small creek and requires frequent mowing to prevent infestation of snakes and vermin.
- This project will greatly benefit the children and parents as well. Children will have fun while they become fit. They will have enhanced eye-hand coordination and their muscular development can help promote strong fitness habits for a lifetime.

**Equipment And Renovation RFP Information**  
**Fiscal Year 2001-2002**

- c) **Please Complete the Budget Thoroughly** – Please review this document to ensure that your budget shows line items in approved categories. If your budget does not add up, it is not possible for reviewers to “assume” what is correct. Accuracy of the information submitted is evaluated in the rating process.
- d) **Compare Your Most Recent Audit Report with What Has Been Provided in the Application for Consistency.** – Staff will review the most recent Audit Report to confirm the fund balance and potential availability of the agency funds to make the requested purchase. If the information is not consistent with the most recently completed audit, points are deducted during the rating process.
- e) **Submit Applications by Agency, not by Program.** Each agency can only request up to \$25,000 total in this process. Only one application for each area can be submitted per agency. One for Equipment & Renovations and one for Computer and Technology (per agency). Agencies may request between \$750-\$12,500 per application.
- f) **Submit the Application By or Before the Time and Date Due as Specified in the Application** – Applications received after the due date will not be accepted or considered.
- g) **Clarify What Other Sources Were Contacted to Secure Funding for the Identified Need** – Identify specific actions that your agency took to secure funds for this purchase. General fundraising for the agency is rated lower than the identification of specific funders/sources that were approached. Specify the result of the request.
- h) **Check Again to Ensure that All Information is Complete, Concise and Comprehensive, and that All Requested Forms and Attachments are Included.**

**16. Bid Information**

- a) Vendor bids must be attached to the appropriate Vendor Quote page.
- b) Bids need to be comparable. (Examples of non-comparable bids are: playground Equipment – metal slide and swing set vs. wooden merry-go-round and swing. Wood bunk beds with bars vs. wood double bed without bars. Chain link fence vs. wooden fence).
- c) Items need to be typed on the Vendor Quote page for the one selected.
- d) If the lower bid is not the one selected, clearly explain why it was not the one selected.



## Equipment And Renovation RFP Information Fiscal Year 2001-2002

- e) Vendor quote information is subject to verification by reviewers.
- f) Be sure the bid will be valid long enough to complete the Equipment and Renovation cycle, and if approved, to complete the purchases. All purchases must be made prior to September 30<sup>th</sup>, 2002.
- g) Be sure to explore and obtain the best possible bids for the quality you need.
- h) If you are submitting a brochure that identifies items and prices, please clearly identify items requested and include a summary calculation of the items, prices, and total.

**Equipment and Renovation**  
**Application FY 2001-2002**

Type the amount of the request in the line below. Please note: Up to \$25,000 may be requested between the two types of applications. The two types of applications are: 1) Equipment & Renovations; 2) Computer & Technology. Only one application for each area can be submitted per agency. Agencies may request between \$750-\$12,500 per application.

Equipment or Facility Renovations:        \$ \_\_\_\_\_

1. **Applicant Agency:** The contact person should be either the agency director or someone who is familiar with the requested purchase.

Agency Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Telephone: \_\_\_\_\_

Agency Director: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Fiscal Officer: \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Official

\_\_\_\_\_  
Date

**Note:**

**JWB & United Way agencies need not complete items 2, 3, 11, 12**

2. **Type of Agency:** Mark the appropriate space for the type of agency. Provide the date of incorporation and the most recent licensing information. Governmental agencies need only mark the governmental space.

Non-Profit \_\_\_\_\_ Governmental:\* \_\_\_\_\_  
Other (Please Specify) \_\_\_\_\_

Date Agency Incorporated: \_\_\_\_\_

Agency Licensed by State, County, City: \_\_\_\_\_

Date & Type of License: \_\_\_\_\_

Currently Licensed?                      Yes        \_\_\_\_\_        No        \_\_\_\_\_

\*If the applicant is a governmental entity with taxing authority, the Juvenile Welfare Board will require for all Equipment and Renovation, confirmation from the Chief Administrative Officer or elected official that there has been a presentation and formal review of the capability of the governmental unit to fund the item and that the funding is not available. Attachment A must be completed and submitted with the application.

**Equipment and Renovation**  
**Application FY 2001-2002**

Agency Name: \_\_\_\_\_

3. Agency Information: In the space provided, describe your agency. Include in the description, a summary of the purpose, goals and the target population.

4. Items Requested

(a) Please list each of the items requested and identify, for each of the requests, if it is for the agency or for a particular program.

Equipment/Renovation	Purchase Price (Include # of items, unit price and total)	Amount Requested (How much of the purchase price is being requested?)	Who is purchase for? (Agency or name of Program)
<i>(Example) Roof</i>	<i>1 @ \$11,625</i>	<i>\$11,625</i>	<i>Sam's Speculator Kids (Agency)</i>
<i>(Example) Sinks for children's bathroom</i>	<i>5 @ \$175 = \$875</i>	<i>\$875</i>	<i>Suzzie's Special Kids (Program)</i>

**Equipment And Renovation  
Application**

**Agency Name:** \_\_\_\_\_

**5. Please explain the need for the request. How will the agency or program participants benefit as a result of the equipment or renovation? (Please limit response to space provided.)**

**6. If the request is program-specific, please provide the following information for each program for which items are being requested: a brief description, a summary of the purpose, goals and the target population.**

**Equipment And Renovation  
Application**

Agency Name: \_\_\_\_\_

7. Please identify other specific actions your agency has taken to secure funds for this purchase. Please fill in the amount of the agency fund balance shown in the last Audit Report: \$\_\_\_\_\_

8. If the Audit Report reflects a fund balance greater than 3 months of operating, please explain why it is not available to be utilized for the purchase(s) requested in this application.

If the Audit report shows no fund balance available, please explain what actions the agency has taken to address the lack of 3 months of operating expenses recommended by standard accounting practices.

**Equipment And Renovation  
Application**

**9. Vendor Quotations**

All items must have a minimum of 2 vendor quotes. Items exceeding \$2,000 require a minimum of three quotes. Copies of written quotes from vendors are required. It is helpful, but not required, to attach photos, specifications, etc. **This page must be completely filled out and applicable quotes attached.** If the lowest bid is not accepted, please explain.

**Vendor #1 (Selected)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Total Cost: \_\_\_\_\_

**Vendor #2 (Not-Selected)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Total Cost: \_\_\_\_\_

**Vendor #3 is Required for Requests Exceeding \$2,000 Only  
(Not Selected)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Total Cost: \_\_\_\_\_

**For building or site improvements related to Code Violations, attach a copy of the official citation or notification if applicable.**

**Equipment And Renovation  
Application**

Agency Name: \_\_\_\_\_

List the agency budget below:

Please do not include any amounts requested through this application as revenue and/or expenses when completing budget below.

10. Provide the beginning and ending month/year of the Agency's Fiscal Year.

Start: Month/Yr \_\_\_\_\_ End: Month/Yr \_\_\_\_\_

11. Agency Expenditures - Round Numbers to Nearest Dollar

	(1)	(2)
Account#/Title	2000-2001 Agency Budget	2001-2002 Agency Budget
Personnel Services		
Total Salaries		
Total Fringe Benefits		
<b>Total Personnel Expenses</b>		
<b>Total Operating Expenses</b>		
<b>Total Agency Budget</b>		

12. Revenue - Please indicate the following:

Total of all 2000-2001 Revenue \_\_\_\_\_

Total of all 2001-2002 Projected Revenue \_\_\_\_\_

**Equipment And Renovation Application – Attachment A  
Governmental Agencies with Taxing Authority Only**

Agency Name: \_\_\_\_\_

Program Title: \_\_\_\_\_

1. Is the scope of the program for which the expenditures are requested, primarily social service, educational, recreational, and/or health care?

Yes \_\_\_\_\_ No \_\_\_\_\_

2. If the scope of the program is primarily social service, educational, recreational, and/or health care, does this request relate to an essential social service element of the program?

Yes \_\_\_\_\_ No \_\_\_\_\_

3. Has your agency assessed its maximum authorized millage?

Yes \_\_\_\_\_ No \_\_\_\_\_

If the maximum has not been assessed, what percentage of the maximum authorized millage has been assessed?

Percent \_\_\_\_\_

4. What is your agency's percentage increase over the rollback rate for FY 00-01?

Percent \_\_\_\_\_

5. Have you included a written statement from the Chief Administrative Officer or elected official as defined in the Special Guidelines for Taxing Authorities section?

Yes \_\_\_\_\_ No \_\_\_\_\_



**Equipment And Renovation RFP  
Rating Scale (FY 01-02)**

Total Score: \_\_\_\_\_  
Maximum Points Possible – 50

Agency Name: \_\_\_\_\_

**Minimum Requirements:**

Proposals that do not receive a YES to the following questions will not be rated.

1. Is the agency a non-profit 501(c)(3) or a unit of local government?  
Yes \_\_\_\_\_ No \_\_\_\_\_
  
2. Is this program currently providing services, or projected to provide services within FY 01-02, to children, families or residents of Pinellas County?  
Yes \_\_\_\_\_ No \_\_\_\_\_
  
3. If a JWB or UW funded agency, the agency is in full compliance with their existing contract.  
Yes \_\_\_\_\_ No \_\_\_\_\_

**Proposal Review**

1. Does JWB/UW/PCCF funding support the program?  
Yes \_\_\_\_\_ (5) No \_\_\_\_\_ (0) = \_\_\_\_\_ (5)
  
2. Has the narrative clearly defined the need for this purchase?  
2 Minimal 4 Somewhat 8 Mostly 10 Fully = \_\_\_\_\_ (10)
  
3. Is this request for building site improvements (with proof provided) for one of the following:
  - Code Violations
  - To Meet Section 504 handicap standards.
  - To increase safety of public, clients or staff.2 Minimal 3 Somewhat 4 Mostly 5 Fully = \_\_\_\_\_ (5)





**DRAFT**

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**Computer & Technology RFP Information**  
**Fiscal Year 2001-2002**

**1. Introduction**

This solicitation seeks applications for equipment and/or facility renovations from governmental or not-for-profit organizations that maintain facilities in Pinellas County, or provide human services to Pinellas County residents. This document contains all the information and guidelines necessary to apply for these funds.

The application process is a joint effort between Juvenile Welfare Board (JWB), Pinellas County Community Foundation (PCCF), and United Way of Pinellas County (UW). The partnership between JWB, PCCF, and UW will leverage financial and human resources available to community agencies. JWB and UW will jointly review all proposals. The JWB is an independent special taxing district created to plan, fund, and coordinate social services for children in Pinellas County, Florida. The UW is a not-for-profit organization, which raises funds in the community to enhance services to persons living in Pinellas County, FL.

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**Computer & Technology RFP Information**  
**Fiscal Year 2001-2002**

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- d) Equipment purchased will be considered the inventory of the provider. Equipment purchased will be accounted for and controlled by the provider. Inventory reports shall be available to JWB, UW, and PCCF upon request. JWB, UW, and PCCF may physically inspect equipment at their discretion.
- e) Once equipment is fully depreciated it becomes the property of the provider. JWB, UW, and PCCF will accept the depreciation schedule of the provider's auditor.
- f) Equipment reverts to the ownership of JWB, UW and PCCF, if the program for which it was purchased is discontinued and the equipment is not fully depreciated.
- g) Equipment purchased with monies from more than one funding source will revert to the ownership of those sources in the same percentage as funded, if the program for which it was purchased is discontinued and the equipment is not fully depreciated.

### 9. Non-Capital Purchase Guidelines

Office supplies, agricultural, laboratory, cleaning and sanitation, household and institutional supplies, supplies used in maintenance and small repairs, chemical drugs and medicines, and other supplies and materials that are routinely operational in nature, are not eligible expenditures under this fund.

**Computer & Technology RFP Information**  
**Fiscal Year 2001-2002**

**10. Special Guidelines for Taxing Authorities**

If the applicant is a governmental entity with taxing authority, written confirmation from the Chief Administrative Officer or elected official that there has been a presentation and formal review of the capability of the governmental unit to fund the item and that the funding is not available. Attachment A must be completed and submitted with the application.

**11. Special Guidelines for Non-JWB and Non-UW Agencies**

Non-JWB or non-UW funded agencies must attach a copy of the most recent audit report. If the audit report is more than 16 months old, you must also provide the most recently completed financial statements. (Note: If an audit has not been completed, please provide year-to-date Financial Statements, to include the most recent month's financial statement.

**12. General Conditions for All Applicants**

- a) The JWB, UW, and PCCF reserve the right to waive any of the stated guidelines where warranted by special circumstances.
- b) JWB, UW, and PCCF will not reimburse purchases, which vary from the approved request without prior approval.
- c) The use of JWB, UW, and PCCF funds under this agreement will not supplant any other funding currently under contract or otherwise previously appropriated.
- d) The applicant must provide five (5) copies of each application. (One original and four copies). Original must be clearly marked as such.
- e) An official authorized to bind the organization to the proposed activity must sign the application.
- f) Only submit the forms applicable to your agency's request. Do not include instruction pages.

**13. Selection Criteria**

- a) Applications will be evaluated using the Application Rating Scale. In addition to the rating scale, the following criteria will be applied to all applications.
  - Compliance with JWB, UW, and PCCF Board Policy and Guidelines outlined in this document.
  - Clarity, accuracy and completeness of the application.
  - Extent to which the requested expenditures will improve the quality of services or significantly improve the efficient delivery of services to residents of Pinellas County.
- b) Priority consideration for funding will be given to requests from programs that are already receiving current JWB, UW, or PCCF funding.
- c) All JWB & UW funded agencies must be in full contract compliance to be eligible for Equipment & Renovation funding.



**Computer & Technology RFP Information**  
**Fiscal Year 2001-2002**

**14. Definitions of RFP Terms**

- a) **Equipment:** Items necessary to efficiently operate a program.
- b) **Renovations:** Enhancements of a facility through remodeling or repairing. Priorities will be given to requests consistent with Section 7c.
- c) **Capital expenditures:** Equipment or renovation expenditures valued at \$750 or more with a useful life of one year or more. Examples include large appliances, lawnmowers, etc.
- d) **Human Services:** Health, social services, education and developmental programs and activities designed to enhance people's development and well-being.
- e) **Non-Capital Expenditures:** Items valued between \$200 and \$750.
- f) **Financial Statements:** The required financial statements are a balance sheet, income statement, and statement of changes in financial position. They may be combined with a supplementary statement to depict the financial status or performance of the organization.

**15. Helpful Hints**

- a) **Attend the Bidder's Conference** – This conference is held to “walk through” the application process, allow potential applicants to ask questions, and clarify the process. Oftentimes, a participant will ask a question that inadvertently assists other participants. This opportunity is provided to ensure clarity on the forms and requests.
- b) **Assume the Reviewer is Not Familiar With Your Agency or Program** – In describing your request, be thorough and write in a manner that someone who is not familiar with your program will fully understand why you are requesting funds. This also applies in the section describing impact for clients or the potential improvement in efficiency.

**Example:**

- Agency ABC operates a transitional housing program consisting of 12 mobile homes situated in a mobile home park, which are used to house homeless families for a 6 to 8 month period, depending on the need of each family. Parents are required to be enrolled in educational programs to help enhance their chances of success in reaching self-sufficiency and ending the cycle of homelessness.
- A playground area has been established in the mobile home park but lacks sufficient equipment. Funds are needed to purchase durable playground equipment for the children.
- A mowing tractor is also needed to provide the maintenance for lawn up-keep in the playground and surrounding areas of the park. The property is located near a small creek and requires frequent mowing to prevent infestation of snakes and vermin.
- This project will greatly benefit the children and parents as well. Children will have fun while they become fit. They will have enhanced eye-hand coordination and their muscular development can help promote strong fitness habits for a lifetime.

## Computer & Technology RFP Information Fiscal Year 2001-2002

- c) **Please Complete the Budget Thoroughly** – Please review this document to ensure that your budget shows line items in approved categories. If your budget does not add up, it is not possible for reviewers to “assume” what is correct. Accuracy of the information submitted is evaluated in the rating process.
- d) **Compare Your Most Recent Audit Report with What Has Been Provided in the Application for Consistency.** – Staff will review the most recent Audit Report to confirm the fund balance and potential availability of the agency funds to make the requested purchase. If the information is not consistent with the most recently completed audit, points are deducted during the rating process.
- e) **Submit Applications by Agency, not by Program.** Each agency can only request up to \$25,000 total in this process. Only one application for each area can be submitted per agency. One for Equipment & Renovations and one for Computer and Technology (per agency). Agencies may request between \$750-\$12,500 per application.
- f) **Submit the Application By or Before the Time and Date Due as Specified in the Application** – Applications received after the due date will not be accepted or considered.
- g) **Clarify What Other Sources Were Contacted to Secure Funding for the Identified Need** – Identify specific actions that your agency took to secure funds for this purchase. General fundraising for the agency is rated lower than the identification of specific funders/sources that were approached. Specify the result of the request.
- h) **Check Again to Ensure that All Information is Complete, Concise and Comprehensive, and that All Requested Forms and Attachments are Included.**

### 16. Bid Information

- a) Vendor bids must be attached to the appropriate Vendor Quote page.
- b) Bids need to be comparable. (Examples of non-comparable bids are: playground Equipment – metal slide and swing set vs. wooden merry-go-round and swing. Wood bunk beds with bars vs. wood double bed without bars. Chain link fence vs. wooden fence).
- c) Items need to be typed on the Vendor Quote page for the one selected.
- d) If the lower bid is not the one selected, clearly explain why it was not the one selected.

**Computer & Technology RFP Information**  
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- e) Vendor quote information is subject to verification by reviewers.
- f) Be sure the bid will be valid long enough to complete the Equipment and Renovation cycle, and if approved, to complete the purchases. All purchases must be made prior to September 30<sup>th</sup>, 2002.
- g) Be sure to explore and obtain the best possible bids for the quality you need.
- h) If you are submitting a brochure that identifies items and prices, please clearly identify items requested and include a summary calculation of the items, prices, and total.

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Type the amount of the request in the line below. Please note: Up to \$25,000 may be requested between the two types of applications. The two types of applications are: 1) Equipment & Renovations; 2) Computer & Technology. Only one application for each area can be submitted per agency. Agencies may request between \$750-\$12,500 per application.

Computer and Technology: \$ \_\_\_\_\_

- 1. **Applicant Agency:** The contact person should be either the agency director or someone who is familiar with the requested purchase.

Agency Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Telephone: \_\_\_\_\_

Agency Director: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Fiscal Officer: \_\_\_\_\_

\_\_\_\_\_  
Signature of Authorized Official Date

**Note:**  
**JWB & United Way agencies need not complete items 2, 3, 11, 12**

- 2. **Type of Agency:** Mark the appropriate space for the type of agency. Provide the date of incorporation and the most recent licensing information. Governmental agencies need only mark the governmental space.

Non-Profit \_\_\_\_\_ Governmental:\* \_\_\_\_\_  
Other (Please Specify) \_\_\_\_\_

Date Agency Incorporated: \_\_\_\_\_  
Agency Licensed by State, County, City: \_\_\_\_\_  
Date & Type of License: \_\_\_\_\_  
Currently Licensed? Yes \_\_\_\_\_ No \_\_\_\_\_

\*If the applicant is a governmental entity with taxing authority, the Juvenile Welfare Board will require for all Equipment and Renovation, confirmation from the Chief Administrative Officer or elected official that there has been a presentation and formal review of the capability of the governmental unit to fund the item and that the funding is not available. Attachment A must be completed and submitted with the application.

**Computer and Technology  
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Agency Name: \_\_\_\_\_

3. Agency Information: In the space provided, describe your agency. Include in the description, a summary of the purpose, goals and the target population.

4. Items Requested

a) Please list all of the items requested and identify, for each of the requests, if it is for the agency or for a particular program.

Equipment/Renovation	Purchase Price (Include # of items, unit price and total)	Amount Requested (How much of the purchase price is being requested?)	Who is purchase for? (Agency or name of Program)
<i>(Example) computer</i>	<i>3 @ \$899=\$2697</i>	<i>\$2000</i>	<i>Joe's Guys &amp; Gals Club (Agency)</i>
<i>(Example) Software for tutorial lab</i>	<i>5 @ \$175 =\$875</i>	<i>\$875</i>	<i>Joe's Going for the Gold Tutoring Program (Program)</i>

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Agency Name: \_\_\_\_\_

b) If you are requesting a computer, please fill in the number of computers being requested in the box below:

Number Requested	ITEM	
Midtower: _____	<u>Computer</u>	
Desktop: _____	HP Vectra 933MHz Intel III Processor 128 MB RAM 15 GB hard drive CD-ROM	Monitor 56K modem MS Windows 2000 Pro
Mini-Tower: _____	3Com NIC card (\$1,600)	

The computer(s) listed above will be purchased by UW/JWB in a bulk purchase to maximize the overall dollars available in the RFP process. These computers will then be distributed directly to the agency by the approved vendor.

All items being requested, including any requested above, should be listed on page 2 of this application.

5. Please explain the need for the request. How will the agency or program participants benefit as a result of the computer or technology request? (Please limit response to space provided.)

**DRAFT**

**Computer and Technology**  
**Application FY 2001-2002**

Agency Name: \_\_\_\_\_

6. If the request is program-specific, please provide the following information for each program for which items are being requested: a brief description, a summary of the purpose, goals and the target population.

7. Please identify other specific actions your agency has taken to secure funds for this purchase. Please fill in the amount of the agency fund balance shown in the last Audit Report: \$ \_\_\_\_\_

**DRAFT**

**Computer and Technology**  
**Application FY 2001-2002**

Agency Name: \_\_\_\_\_

8. If the Audit Report reflects a fund balance greater than 3 months of operating, please explain why it is not available to be utilized for the purchase(s) requested in this application.

If the Audit report shows no fund balance available, please explain what actions the agency has taken to address the lack of 3 months of operating expenses recommended by standard accounting practices.



**Computer and Technology**  
**Application FY 2001-2002**

**9. Vendor Quotations**

All items must have a minimum of 2 vendor quotes. Items exceeding \$2,000 require a minimum of three quotes. Copies of written quotes from vendors are required. It is helpful, but not required, to attach photos, specifications, etc. **This page must be completely filled out and applicable quotes attached.** If the lowest bid is not accepted, please explain.

**Vendor #1 (Selected)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Total Cost: \_\_\_\_\_

**Vendor #2 (Not-Selected)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Total Cost: \_\_\_\_\_

**Vendor #3 is Required for Requests Exceeding \$2,000 Only  
(Not Selected)**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Total Cost: \_\_\_\_\_

**For building or site improvements related to Code Violations, attach a copy of the official citation or notification if applicable.**

**Computer and Technology**  
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Agency Name: \_\_\_\_\_

List the agency budget below:

Please do not include any amounts requested through this application as revenue and/or expenses when completing budget below.

10. Provide the beginning and ending month/year of the Agency's Fiscal Year.

Start: Month/Yr \_\_\_\_\_ End: Month/Yr \_\_\_\_\_

11. Agency Expenditures - Round Numbers to Nearest Dollar

	(1)	(2)
Account#/Title	2000-2001 Agency Budget	2001-2002 Agency Budget
<b>Personnel Services</b>		
Total Salaries		
Total Fringe Benefits		
<b>Total Personnel Expenses</b>		
<b>Total Operating Expenses</b>		
<b>Total Agency Budget</b>		

12. Revenue - Please indicate the following:

Total of all 2000-2001 Revenue \_\_\_\_\_

Total of all 2001-2002 Projected Revenue \_\_\_\_\_

**Computer and Technology**  
**Application FY 2001-2002**

**Attachment A**  
**Governmental Agencies with Taxing Authority Only**

Agency Name: \_\_\_\_\_

1. Is the scope of the program for which the expenditures are requested, primarily social service, educational, recreational, and/or health care?

Yes \_\_\_\_\_ No \_\_\_\_\_

2. If the scope of the program is primarily social service, educational, recreational, and/or health care, does this request relate to an essential social service element of the program?

Yes \_\_\_\_\_ No \_\_\_\_\_

3. Has your agency assessed its maximum authorized millage?

Yes \_\_\_\_\_ No \_\_\_\_\_

If the maximum has not been assessed, what percentage of the maximum authorized millage has been assessed?

Percent \_\_\_\_\_

4. What is your agency's percentage increase over the rollback rate for FY 00-01?

Percent \_\_\_\_\_

5. Have you included a written statement from the Chief Administrative Officer or elected official as defined in the Special Guidelines for Taxing Authorities section?

Yes \_\_\_\_\_ No \_\_\_\_\_

Equipment And Renovation RFP  
Rating Scale (FY 01-02)

Total Score: \_\_\_\_\_  
Maximum Points Possible – 50

Agency Name: \_\_\_\_\_

Minimum Requirements:

Proposals that do not receive a YES to the following questions will not be rated.

1. Is the agency a non-profit 501(c)(3) or a unit of local government?  
Yes \_\_\_\_\_ No \_\_\_\_\_
2. Is this program currently providing services, or projected to provide services within FY 01-02, to children, families or residents of Pinellas County?  
Yes \_\_\_\_\_ No \_\_\_\_\_
3. If a JWB or UW funded agency, the agency is in full compliance with their existing contract.  
Yes \_\_\_\_\_ No \_\_\_\_\_

Proposal Review

1. Does JWB/UW/PCCF funding support the program?  
Yes \_\_\_\_\_ (5) No \_\_\_\_\_ (0) = \_\_\_\_\_ (5)
2. Has the narrative clearly defined the need for this purchase?  
2 Minimal 4 Somewhat 8 Mostly 10 Fully = \_\_\_\_\_ (10)
3. Is this request for building site improvements (with proof provided) for one of the following:  
  - Code Violations
  - To Meet Section 504 handicap standards.  
To increase safety of public, clients or staff.
2 Minimal 3 Somewhat 4 Mostly 5 Fully = \_\_\_\_\_ (5)

DRAFT

Equipment And Renovation RFP  
Rating Scale (FY 01-02)

4. Will this purchase enhance program services to participants or enhance agency effectiveness?

2            4            8            10            = \_\_\_\_\_  
No    Somewhat    Mostly    Fully            (10)

5. Did the agency fully explain why, if available, fund balance dollars couldn't be utilized for the request OR if the agency had less than 3 months of operating, justify actions the agency had taken to secure funds?

2            4            8            10            = \_\_\_\_\_  
Minimal    Somewhat    Mostly    Fully            (10)

6. Does the application contain complete information?

2            4            8            10            = \_\_\_\_\_  
Minimal    Somewhat    Mostly    Fully            (10)

Total Score \_\_\_\_\_

Notes: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Possible Score = 50