

PART TWO: FUNDING OF COMMUNITY ORGANIZATIONS

1.0 Policies pertaining to Funding of Community Organizations

1.1 Objective

The Escambia Children’s Trust recognizes its responsibility to address the needs of children and their families comprehensively while maintaining a special focus on prevention, early-intervention, and neighborhood-oriented approaches. The Board achieves its objective through a variety of staff-directed functions including planning, community development, resource development, coordination, research, advocacy, training, technical assistance, evaluation, communications, and funding. The Trust undertakes this mission in an integrated, cooperative manner involving coalitions of community organizations, groups, and individuals.

1.2 Purpose

Funds shall be allocated in accordance with the intent of the enabling Ordinance 2020-22, as may be amended.

The Trust, thereby created, has the powers and duties to provide, maintain, manage, and allocate funds to organizations providing services that are operated for the benefit of The Trust children and families as determined or directed by the Trust in accordance with the Strategic Plan and Adopted Budget.

1.3 Funding Process

ECT funds programs through its Adopted Budget, subject to the Truth in Millage (TRIM) process and adherence to ECT funding policies. The applicable budget line item is titled “Grants & Aids to Outside Agencies.” Funds within this line item will be divided into two categories: assigned and unassigned. Assigned funds within the line item will be allocated to competitive and non-competitive funding categories. Unassigned funds will remain available for award to outside agencies for emergency grants or to support unanticipated emerging needs in the community.

Funding awards may be reduced or terminated based on changes in ECT priorities, a reduction in revenues, or when program monitoring reveals a compliance infraction or poor performance.

1.4 Funding Eligibility

- a. Organizations in Escambia County that are operated for the benefit of children are eligible for Escambia Children’s Trust funding, including but not limited to:
 1. Non-profit organizations
 2. For-profit organizations as long as the funding does not result in a prohibited private benefit (i.e., profit).
 3. Other governmental organizations
- b. Organizations or programs that operate under the exclusive jurisdiction of the public school system are prohibited from applying for funds directly from ECT. However, the Trust may fund

services through other organizations that are coordinated with and complement the services provided by the Escambia County School District, and such services may be provided on sites owned or administered by the Escambia County School District.

- c. Programs requiring worship or religious instructional activities, as a condition of participation, shall not be funded. Funding may be provided through faith-based or religious organizations if the program serves a secular purpose, if the principal or primary effect of the program is one that neither advances nor inhibits religion, and if the program does not foster an excessive government entanglement with religion.
- d. ECT funded programs are required to:
 - 1. Be in direct alignment with the goals and strategies of the Trust's Strategic Plan.
 - 2. Certify that Trust funds will not replace or supplant existing resources.
 - 3. Serve children below the age of 18, or beyond if still in high school, or if developmentally disabled as defined by the Individuals with Disabilities Education Act (IDEA) and under 22 years of age, and the family members or primary caregivers of those children and individuals in Escambia County, Florida.
 - 4. Provide for adequate protection of youth and must comply with all applicable laws and implementing regulations, including, but not limited to, Chapter 435, Florida Statutes. All program staff and agency staff (including employees, independent contractors and staff of subcontractors), volunteers, and those who may have access to youth participants supported through ECT funding are required to undergo and pass a Level 2 background screening that complies with Level 2 standards set forth in Sec. 435.04, Florida Statutes.
 - 5. Maintain participant records and have them available for inspection for five (5) years after termination of ECT funded services.
- e. ECT funded programs are encouraged to:
 - 1. Involve collaborations with other community partners in the public and/or private sector.
 - 2. Show efforts to diversify financial support.
- f. ECT funded programs shall not:
 - 1. Operate under the exclusive jurisdiction of the public school system.
 - 2. Give preference to participants who are easier to serve or less costly to serve; this includes recruitment and outreach.
 - 3. Make or accept payment or other non-monetary consideration in exchange for referrals
 - 4. Use Trust funds to preferentially treat community partners, advisory group members, volunteers, personnel, or consultants.
- g. ECT funded programs shall comply with the terms of their contract with the Trust and the specifications in the solicitation to which they responded, if applicable.

2.0 Policies Pertaining to the Award of Funding to Community Organizations

2.1 Generally, ECT funds community services through competitive solicitations, except as otherwise provided in this policy. All funding awards to community organizations (i.e., outside agencies) must be approved by the Board and address one or more indicators identified in the ECT needs assessment. The award must be in direct alignment with the goals and strategies of the Trust's Strategic Plan.

2.2 Competitive Funding to Community Organizations.

A. Invitation to Bid (ITB).

1. When required. Except as otherwise provided in this policy, all contracts for purchases in excess of \$35,000.00 shall be awarded through a competitive bidding process. All ongoing contractual services, both initially and on a three- or five-year cycle, depending on the needs of the organization, shall also be awarded through a competitive bidding process.
2. Invitation to Bid (ITB)—Generally. An invitation to bid shall be issued and shall include desired service or product specifications and all contractual terms and conditions applicable to the procurement.
3. Notice. Adequate public notice of the ITB shall be given a reasonable time prior to the date set forth therein for the opening of bids. Such notice shall involve publication on the ECT website, inclusion in the Trust newsletter, and distribution via email to organization that subscribe to Trust solicitation notices. Notices of ITBs shall also be distributed via press releases to local media outlets, including but not limited to local print and online newspapers, radio, and television stations and will be posted on ECT social media accounts, including Facebook and Instagram.
4. Submission of Bids. Unless otherwise stated in the solicitation, responses must be submitted electronically, either by electronic mail or via the ECT online application portal. Complete responses must be properly submitted and received by the no later than the date and time stated in the solicitation. Responses received after the stated date and time will be disregarded.
5. Opening bids. Bids shall be received and acknowledged by the designated point of contact named in the ITB solicitation. No bids shall be opened until the solicitation deadline has passed. ECT considers bids and proposals to be publicly opened when such bids are opened at a noticed time and place designated in the invitation to bid and open to the public, in the presence of the Clerk of the Trust, a representative from the Trust, and one or more witnesses. The amount of each bid, and such other relevant information as may be specified by regulation, together with the name of each bidder, shall be recorded; the record and each bid shall be open to public inspection.
6. Evaluation of bids. Bids shall be unconditionally accepted without alteration or correction, except as authorized in this policy. Bids shall be evaluated based on the requirements set forth in the ITB, which may involve criteria to determine

- acceptability such as inspection, testing, quality, workmanship, delivery, and suitability for a particular purpose. Those criteria that will affect the bid price and be considered in evaluation for award shall be objectively measured, such as discounts, transportation costs, and total or life cycle costs. No criteria may be used in bid evaluation that are not set forth in the invitation to bid.
7. Bid award. Competitive bids will be awarded to the lowest responsive and responsible bidder.
 8. In the evaluation of the bids, all factors in the bidding process being equal, both as to dollar amount and ability to perform, priority will be given first to businesses enterprises headquartered in Escambia County; secondly, to businesses certifying as minority, veteran, or women owned businesses; and thirdly, as a drug- and tobacco-free workplace.

B. Request for Proposal (RFP).

1. Conditions for use. When the Trust determines that the use of competitive sealed bidding is either not practicable or not advantageous to the Trust, a contract for materials, supplies, services, construction, and equipment may be entered into by the use of competitive proposals. Except as otherwise stated in this policy, contracts for Direct Community Services shall be entered into in response to a Request for Proposals. Determination to use the RFP process include, but are not limited, whether the following considerations apply:
 - a. Practicality of a fixed-price or cost contract under the circumstances.
 - b. The quality, availability, or capability is overriding in relation to price in procurement of goods or services.
 - c. The need for initial installation to be evaluated, together with subsequent maintenance and service capabilities and what priority should be given these requirements in terms of the best interest of the community.
 - d. The marketplace will respond more favorably to a solicitation not only permitting a range of alternate proposals, but also permitting evaluation and discussion by the Trust with proposers before making the award.
 - e. A performance specification is deemed more appropriate than a technical specification, thus taking advantage of vendor expertise and allowing the purchase of standard items available in the marketplace as opposed to custom-designed.
2. Solicitation. Proposals shall be solicited through a request for proposals (RFP).
3. Release of Solicitation. For every competitive RFP, the Trust Board shall approve the minimum qualifications, the scope of services, the evaluation criteria, and the evaluation team for each competitive procurement opportunity. The Executive Director or their designee will notify, via email, all Board members of the release of the solicitation and of the imposition of the Cone of Silence/Limitations on Communications.

4. Public notice. Adequate public notice of the request for proposals and any addenda shall be given in the same manner as provided for competitive Invitations to Bid (ITBs).
5. Evaluation criteria. The RFP shall clearly state the evaluation criteria, which may include, but are not limited, the following factors:
 - a. Program Design.
 - b. Proposed outcomes and performance measures.
 - c. Quality of goods/services. Such a justification must be verifiable.
 - d. Plan to deliver the goods/services within the designated project period and to the target audience, if applicable.
 - e. Quality of goods and after-sale services, including availability of parts/supplies, maintenance, warranties, etc.
 - f. Records of prior performance and service.
 - g. Capacity of proposer to render high quality services as outlined in the program design.
 - h. Financial stability of the proposer.
 - i. Comprehensive and cost-effective budget.
6. Proposer Workshops: Trust staff may facilitate workshops to review and answer questions regarding the RFP at a publicly noticed meeting as specified in the RFP.
7. During the cone of silence, all communication between the proposer and Trust staff or Board members is prohibited with the exception communication at the proposer workshop or questions submitted in writing and directed only to the point of contact identified by the RFP before the deadline for questions. All questions submitted at the workshop and to the designated contact will be posted along with the official responses from the Trust on the ECT website so that all proposers have equal access to the information.
8. Responsive submissions to RFPs shall be accepted via email or online portal, as designated in the RFP.
9. Review. Proposals are independently reviewed and scored by a Grants Committee, which is a team of reviewers that may include Trust Board members, local leaders in the field, and other subject matter experts. The composition of the Grants Committee is determined by the Trust Board. Using the scoring matrix included in the RFP, reviewers assess the soundness and completeness of each proposal as well as the proposer's capacity to effectively deliver what is proposed. Responsive proposals are made available for public review through the Public Records Request process.
10. Grants Committee Meeting. After individual reviewers have independently reviewed and scored proposals, the Grants Committee convenes in a publicly noticed meeting to discuss each proposal and record each reviewer's rating, including explanatory

comments. Proposers may attend the public Grant Committee meeting as observers. Cumulative scores are recorded for each proposal, and proposals are ranked according to scores. The Grants Committee votes on the cut-off score and the list of proposals to be recommended for funding. Consideration is also given to factors such as effective and economical distribution of funding across Escambia County and/or in underserved geographic areas/populations in Escambia County (if applicable) to address gaps in services while preventing duplication of services. All documents related to a competitive solicitation, such as reviewers' proposal scoresheets, are public records and must be given to the Trust as part of the procurement process when the recommendations are presented to the Board.

11. Interview/site visit. As part of the review process and following the Grants Committee meeting, publicly noticed interviews and/or site visits may be conducted, at the Trust's discretion, for projects being considered for funding recommendation. These interviews or site visits may be held at either the proposer's site or the ECT offices. Members of the public may attend interviews and/or site visits as observers. The Grants Committee will reconvene immediately following the last interview/site visit to confirm or revise the recommendation list.
12. Funding recommendations. The list of recommendations from the Grants Committee will be posted on the Trust website within one (1) business day of the Grants Committee's final recommendation. The list of recommendations will include a list of all proposals received including a brief synopsis of each proposed project, the scores and comments from all reviewers, the total cumulative scores for each proposal, the proposals selected for funding, the amount requested, and the total amount recommended for funding as well as any comments or notes regarding the recommendations. Recommendations will be posted as part of the Board packet for the Trust Board meeting at which the awards will be considered for approval.
13. Board review and award. The full proposals and the summary spreadsheet are forwarded to all Board members for their reference along with the Grants Committee scores, comments, and recommendations. The recommendations are reviewed and considered by the Board at a publicly noticed meeting. Proposers are encouraged to attend these meetings. Board approval of the recommendations will allow the contract negotiation process to begin, in an amount not to exceed the Board's approved award.
14. Negotiation may include reframing the proposed services, revising the proposed budget, or any other changes necessary to comply with the requirements of the solicitation and resulting contract. Any future amendments, extensions or modifications to the contract that would exceed the Board's approved award amount or the approved contracting period require further Board approval.

2.3 Required Contract Clauses for Direct Community Services.

All contracts for Direct Community Services shall have the following clauses:

- a. Maximum Indebtedness
- b. Term of Service
- c. Contract Type: either fee-for-service, cost reimbursement, or another method approved by the Trust
- d. Scope of Work, which may include incorporating by reference the response to the solicitation
- e. Deliverables and Performance Measures
- f. Reporting Schedule and Requirements
- g. Trust's right to withhold or suspend payment, or terminate the contract, if the Provider has not met the performance measures contained in the contract
- h. Trust's right to terminate for a lack of appropriations

2.4 Contract Amendments for Funded Community Organizations.

A. Guidelines

1. Proposed amendments should not compromise the original intent or intended outcome of the funded project. Any changes to deliverables or performance measures require prior written approval from the Trust.
2. The Trust's approval of amendment requests will take into consideration if there is sufficient time for the funded project to be delivered within the contract term.
3. Revisions to the ECT-approved grantee detailed line-item budget require the submission of a written budget revision request. The budget revision request must show the line item(s) from which dollars are being moved and the line item(s) to which dollars are being added as well as the justification for the revision.

B. Approval Threshold

1. Proposed amendments that compromise the original intent or intended outcome of the funded project will not be approved.
2. No contract amendment will be required for budget revisions that are less than 10% of the overall budget.
3. Budget revision requests to move 10% or more of the overall budget between or among line items require prior written Trust approval. No contract amendment will be required so long as the original intent and intended outcomes of the contract are maintained. Requests that exceed 10% shall be presented to the Board for consideration at a publicly noticed meeting.

2.5 Non-Competitive Funding to Community Organizations

A. Sole-source Special Community Initiatives

1. Conditions for use. Requests for funding submitted by a community organization based solely upon the requester's initiative, and not in response to a formal solicitation or procurement process of The Trust, will be considered for funding on a case-by-case basis

following the processes described in this Policy. Sole-source special community initiatives are defined as meeting the following criteria:

- a. Address identified gaps in services or community needs identified in the Trust's needs assessment
 - b. Are typically administered solely by specific organization or collaborative in Escambia County
 - c. Provide a specialized or unique service or product that does not lend itself to a competitive proposal process
2. Evaluation. ECT staff will consider whether the proposal meets the stated goals and objectives of the Trust's Strategic Plan, whether the services address a gap in services or an existing need identified by the Trust's most recent Needs Assessment, and whether the costs are commensurate with the outcomes proposed. The Trust may consider other criteria in making a recommendation for funding so long as the criteria is explicitly stated in the recommendation.
 3. Recommendation. Organizations not recommended for funding shall be notified in writing by the Executive Director. Organizations recommended for funding shall be presented to the Board for approval.
 4. Contracts. Organizations awarded funding under this provision shall be contracted in accordance with the policies stated in Sections 2.3 and 2.4.

B. Matching / Leveraged Funds

1. Conditions for use. A proposal for match funding may be submitted to the Trust either when:
 - a. The initial funding is sought from the primary funding source (preferred); or
 - b. After the primary funding source has confirmed the award.
2. No proposer should indicate that a match or leveraged funds will be provided by ECT unless and until the Trust Board has approved the award of ECT funding. Proposers are encouraged to seek approval of match or leveraged funds prior to their initial application to the intended primary funding source.
3. Review. The Executive Director or designee will review the application for documentation verifying that:
 - a. Match funding is required by the primary funding source.
 - b. Proposer brings new funds to Escambia County (i.e., not simply replacing an existing match or supplanting matching local dollars that already exist in the community).
 - c. Proposer
4. Evaluation. The Executive Director or designee will consider whether the proposal meets the stated goals and objectives stated by the Trust, whether the services fill a community need, and whether the costs are commensurate with the outcomes proposed by the proposer. The Executive Director may consider other criteria in making a recommendation for funding so long as the criteria are explicitly stated in the recommendation.

5. Recommendation. Organizations not recommended for funding shall be notified in writing by the Executive Director. Organizations recommended for funding shall be presented to the Board for approval.
6. Contracts. Organizations awarded funding under this provision shall be contracted in accordance with the policies stated in Sections 2.3 and 2.4.

C. Sponsorships

1. Conditions for use. ECT wishes to support local organizations by providing sponsorships for events and activities supporting children and their families. Funds for this special category are limited and denial of any request shall in no way be construed as a reflection on the project submitted or the agency involved.
2. Review. The Executive Director or designee will review the application and documentation. The submission should include, at a minimum:
 - a. A letter on the organization's official letterhead signed by an authorized signer, at a minimum of sixty (60) days, but no more than one-hundred and eighty (180) days in advance of the planned activity.
 - b. Briefly describe the planned event and its relationship to the mission and goals of the ECT.
 - c. Include information about the purpose/goals of the event, the estimated impact and number of citizens or community members reached.
3. Evaluation. The Executive Director or designee will consider whether the proposed sponsorship meets the goals and objectives stated by the Trust, whether the event activities address a community need, and whether the costs are commensurate with the anticipated impact and reach. The Executive Director may consider other criteria in making a recommendation for sponsorship funding so long as the criteria are explicitly stated in the recommendation.
4. Recommendation. Organizations not recommended for funding shall be notified in writing by the Executive Director. Organizations recommended for funding shall be presented to the Board for approval.
5. Payment. If approved, the request and backup documentation are provided to the ECT Director of Finance for processing. Payments are made electronically, mailed, or hand-delivered to the requesting agency.

2.6 Protests

Any actual or prospective bidder or proposer, who is allegedly aggrieved in connection with the issuance of a solicitation or proposal package or pending award of a contract, may protest the decision by following the procedure below.

1. Posting. The Trust shall publicly post the award on the Trust's website within three full business days after the Board's award decision has been made. All proposers will be sent an email with the notice of award to the email address provided in the proposal.
2. Requirements to Protest.
 - a. A formal written protest must be filed no later than 5:00 PM, on the fifth business day after the notice of award has been posted. The formal written protest shall

identify the protesting party and the solicitation involved; include a clear statement of the grounds on which the protest is based; refer to the statutes, laws, ordinances, applicable section(s) of the solicitation or Board policy, or other legal authorities which the protesting party deems applicable to such grounds; and specifically request the relief to which the protesting party deems itself entitled by application of such authorities to such grounds.

- b. A formal written protest is considered filed when the Executive Director receives it and it is date-stamped by the Trust. Accordingly, a protest is not timely filed unless it is received within the time specified above. Failure to file a formal written protest within the time period specified shall constitute a waiver of the right to protest and result in relinquishment of all rights to protest by the actual or prospective Proposer.
3. Sole Remedy. These procedures shall be the sole remedy for challenging an award in response to a solicitation. Proposers are prohibited from attempts to influence, persuade, or promote a protest through any other channels or means.
4. Authority to Resolve. The Executive Director shall resolve the protest in accordance with the terms of the solicitation and shall render a written decision to the protesting party no later than 5:00 PM on the fifth business day after the filing of the written protest.
5. Review of Executive Director's Decision.
 - a. The protesting party may request a review of the Executive Director's decision by the Board by delivering a written request for review of the decision to the Executive Director by 5:00 PM on the fifth business day after the date of the written decision. The written notice shall include any written or physical materials, objects, statements, and arguments, which the protesting party deems relevant to the issues raised in the request for review.
 - b. The Board will consider the request for review at the next regularly scheduled Board meeting after the request is received. It is within the Board's discretion whether to allow testimony or argument from the protesting party at the Board meeting. If it is determined by majority vote of Board members present at the meeting that the award is in violation of law or the regulations and internal procedures of the ECT or any another applicable authority, the Board shall cancel or revise the award as deemed appropriate within three business days after the Board meeting.
 - c. If it is determined by majority vote of Board members present at the meeting that the award should be upheld, the Board shall direct staff to notify the protesting party in writing of the Board decision with a copy furnished to all substantially affected persons or businesses within three business days of the Board meeting. The decision shall be final and conclusive as to the Trust.
6. Stay of Procurement during Protests. The decision to stay a procurement during protests shall be at the sole discretion of the Executive Director.