

## **Section II: Intermediary Description and Project Timeline**

“Social networks are important in all our lives, often for finding jobs, more often for finding a helping hand, companionship, or a shoulder to cry on.”

*Claude S. Fischer*

1. Geographic Area to be Served. United Way of Brevard (UWB), a non-profit 501(c)(3), proposes to serve as the intermediary organization and grant recipient/fiscal agent to identify, engage, and expand the capacity of at least 40 grassroots faith-based and community-based (FB/CB) organizations serving the *four distinct communities* which comprise Brevard County, Florida. Subgrants will be awarded to 20 organizations with a minimum of an additional 20 participating in technical assistance sessions. Stretching 72 miles from the Kennedy Space Center to Sebastian Inlet, Brevard County is home to nearly 500,000 residents with a median family income of \$34,000. 11.3% of the population lives below poverty level, nearly 30% of students are on free-and-reduced lunch, and almost 25% of the population is on Temporary Assistance for Needy Families (TANF). The *Titusville/Mims* community represents North County and abuts the Kennedy Space Center complex. This community continues to suffer a dearth of human service agencies with the capacity to address the growing needs of the community. *Cocoa Beach/Merritt Island* in Central Brevard is home to Patrick Air Force Base and numerous hospitality establishments hit hard by the tragedies of September 11. *Cocoa/Rockledge* also in Central Brevard is a mix of the poorest and the wealthiest neighborhoods in the county, suffering from pockets of double-digit unemployment and large numbers of elderly residents. South County is comprised of Melbourne/Palm Bay the most populace and fastest growing community in Brevard, challenged by the massive increase of non-English speaking residents.

2. Name of the Local Workforce Area. The Brevard Workforce Development Board (BWDB) serves as the local workforce investment board under WIA and oversees workforce development services in Florida Region 13. BWDB is one of the original 10 USDOL One Stop Learning Labs.
3. Constituent Members. An advisory council reflecting the diversity of our community will oversee the project, with membership from UWB board of directors, BWDB, Links of Hope, Alliance for Neighborhood Restoration, and the Youth Pastors Advisory Board.
4. Primary Mission. The mission of UWB is *to be Brevard's leader in mobilizing the caring power of our community*. Past success in envisioning and deploying strategies to strengthen our community include being the first in Florida and seventh in the nation to implement a 211 information access line, serving as the fiscal agent and coordinator for numerous county-wide strategic planning efforts, successfully competing for public funding to expand the children and family services offered by local agencies, and being the preferred fiscal agent for numerous community collaborative efforts. We recently completed a comprehensive process to refocus our organizational efforts, adopting basic human needs (food and shelter) and increasing community social capital as our top priorities. Our social capital initiatives are rooted in the work of Dr. Robert D. Putnam, a respected scholar and educator, whose acclaimed book Bowling Alone argues for community revitalization through spiritual and civic engagement.
5. Written Confirmation of Cooperation. UWB has always supported and will continue to support all agencies receiving one stop workforce development funding as well as other resources made available through federal and state revenues.

## Project Timeline

		Month													
Activity	Pre-Award	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Draft Technical Assistance Provider Supplement Template	X														
Draft Faith-based & Community-based Provider RFP	X														
Contract Award Announcement		X													
Release of Faith-based/Community-based RFP & Selection of Core Subgrantees		X	X												
Contract Negotiations			X												
Project Orientation and Technology Assessment			X												
Host Group Technical Assistance Sessions				X	X	X	X	X	X	X	X	X			
Implement & Monitor Mini-Career Center Progress				X	X	X	X	X	X	X	X	X	X		
Release Enhancement RFP & Negotiate Services					X	X									
Implement & Monitor Provider Enhancement Services							X	X	X	X	X	X	X		
Develop & Implement Individual Technical Assistance Plans					X	X	X	X	X	X					
Design Evaluation & Establish Baselines	X														
Implement Project Data Collection Strategy				X	X	X	X	X	X	X	X	X	X		
Host Regional Conference													X		
Attend as Presenters at Selected National Conferences										As Requested					
Prepare Final Report & Close Out														X	X

### Section III: Statement of Work

#### 1. Prior Grant Management Experience

a. Performance History as Intermediary. In 1998 UWB embarked on a new strategic direction to build grant management as a core competency. This decision was driven by requests we had received previously from local and state funders to serve as fiscal agent and facilitator of key projects. Within four short years, *government and private grants have grown to comprise over 32% of our corporate budget.* We remain active in a number of early projects, including *Victims of Crime Act (VOCA)* funding through the State Attorney's Office. Since 1997 we have helped to annually distribute over \$1.02 million to domestic violence shelters and other victim advocates, serving as the convener of award panels and assessor of program outcomes. In late 1998 we were asked to assist in writing a grant to bring the *Healthy Families* program to Brevard. Funded at over \$1.2 million by the State Department of Children and Families (State Welfare), UWB served as convener, facilitator, and fiscal agent of the process, and today continues to serve as fiscal agent, grant manager, and technical assistance administrator. Also in late 1998 we were designated as fiscal agent for over \$220,000 in *Wildfire Relief* funding, distributing dollars to Brevard County residents and businesses impacted by these weather-related events. When the state established local *School Readiness Coalitions* in mid 1999, UWB was again asked to serve as the convener for the Brevard County planning grant, offering staff support and facilitation to develop the process and implementation plan. Modeled after the locally driven decision making process embodied in federal and state workforce development legislation, UWB helped transform our local approach to school readiness including the identification of a qualified local provider to administer over \$16 Million in early childhood funding. In early 2000 we were asked by the *Together in Partnership*

*Leadership Roundtable* to serve as fiscal agent for a small research project regarding factors impacting juvenile delinquency. Soon thereafter we were asked to assume staff support for the local *Children's Services Council* (who staffed the Roundtable) when organizational changes threatened continuation of the agency. This relation engaged us further in the work of the Roundtable and set the stage for UWB to co-host the first *Youth Pastors Outreach Summit* held earlier this year. In October 2000 we were called upon by the State Department of Health to serve as lead agency for over \$400,000 in *Housing Opportunities for People with AIDS* (HOPWA) funding, and continue today providing fiscal agent, program coordination, performance monitoring, and technical assistance services. In early 2001 we were asked by the County Commission and Community Leaders Taskforce to serve as fiscal agent for the \$140,000 raised for the *Brevard Tomorrow* strategic planning process. Our board chair was also selected to co-chair this county-wide planning effort. And lastly, annually UWB is the trusted administrator of over \$4 million in *donor contributions*, holding contracts with over 43 local agencies. UWB clearly understands the importance of public trust. Each year we undergo a thorough independent audit and have recently completed an internal assessment of our corporate processes and procedures. Our commitment to excellence also includes mandatory outcome-based reviews of each of our member agencies and current subgrantees. Further, we are proud of our administrative cost containment efforts. Historically we restrict our administration to less than 10%, which when benchmarked against other United Ways of our size places us in the lowest quadrant for this indicator.

b. History of Working with Small Organizations. Over 34% or 15 of our member agencies and current subgrantees have total budgets of less than \$500,000. Our work

with these agencies has been to identify better practices, provide resources, and enhance their automation capability while infusing training and technical assistance to expand capacity. We have recently purchased a client information system which will allow member agencies and current subgrantees to track common clients, log services, and report outcomes. Our experience working with these small agencies positions us to *understand the challenges faced by the very organizations we will serve as the intermediary under this grant award.*

c. History of Information Campaigns and Provision of Technical Assistance. A natural intermediary, UWB specializes in raising community issues, identifying champions to provide the time and energy (“heartbeats”) to drive action, and facilitating the development of community capacity to implement sound strategies. Examples of specific information campaigns include:

- Designed and implemented the 211 community awareness plan including billboards, handbills, and work with local media (TV, radio and print).
- Designed and implemented the “Know your Neighbor” campaign to strengthen neighbor-to-neighbor ties. Campaign included access to mini-grants targeted to disadvantaged neighborhoods.
- Annually conduct an extensive donor awareness campaign to promote individual and corporate giving.

We also have a sound history of providing technical assistance to support capacity building. Examples include:

- Conducted Outcome Measurement training and provided individualized technical assistance to over 45 current and prospective United Way member agencies.

- Established a Youth Pastors Advisory Board to identify common issues of concern.
- Co-hosted first *Youth Pastors Outreach Summit* connecting 70 local ministers with more than 30 community leaders, among them, the superintendent of schools, sheriff, county commissioners, public defender, state attorney, health director, Welfare Department administrator, Children's Services Council chair, and representatives from Patrick Air Force Base, courts, business community, and BWDB.
- Introduced Links of Hope (an 8-church network providing family management services) to a community strategic planning coalition for children/youth services, facilitated their application for \$300,000 in CDBG funding from Brevard County Board of County Commissioners (award pending), supported their successful application for membership in the Child Abuse Prevention Task Force of Brevard County, and advocated for their ability to receive referrals of at-risk families from the state Welfare Department.
- Assisted the Rockledge Presbyterian Church's youth services forum, in which youth researched community problems and committed to address the shortage of after-school programming. Served as discussion facilitators between their youth ministry and Boys and Girls Clubs of Brevard for contracted after-school services.
- Assisted First United Methodist Church of Cocoa Beach in planning and obtaining key community speakers for a forum on child abuse prevention in the faith-based community.

- Currently assisting the East Coast Christian Center's youth ministry to locate potential funding sources to complete a community youth center, and to establish relationships with Big Brothers/Big Sisters for best practices mentoring programs.
- Annually coordinate county-wide "Days of Caring" with over 1100 volunteers working on over 85 projects. Consistently assists in the post-event recruitment of volunteers by individual project sponsors.

The complement of professionals engaged in this proposal also brings both depth and breadth to this effort.

- **Rita Elkins**, Faith-based Initiative Coordinator, has over 20 years of experience supporting major community initiatives including 12 years reporting on religion and human services for the local daily newspaper. She has an extensive network of positive personal relationships within the faith-based, government, and human services communities. Currently she serves as facilitator for the Department of Education's Shared Services Network grant, developing and supporting local collaborations of public and private partnerships to improve outcomes for children, youth and families. Ms. Elkins will serve as project manager using her extensive skills and contacts to implement the outreach campaign, coordinate the subgrantee selection process, monitor subgrantee progress, and interface as project liaison with the Brevard Job Link, our county's one stop workforce development system identifier. A lifelong student, Ms. Elkins has studied broadcast journalism and marketing at the University of Maryland, print design at Maryland School of Art and Design, English and journalism at Brevard Community College, pastoral counseling at the Institute for Christian

Studies/University of the South, and is currently enrolled in the School of Psychology at University of Central Florida. Ms. Elkins is a Fellow of the Casey Journalism Center for Children and Families at the University of Maryland, the Garrett-Medill Center for Religion and the News Media at Northwestern University, and the Boston University Center for Judaic Studies.

- **Sherrie Arflin**, Director of Grant Administration, has 3 years of experience overseeing federal and state grants and over 7 years in direct human services. Ms. Arflin will serve as technical expert related to grant management issues, will coordinate the evaluation strategy, and interface with USDOL regarding overall project status including required reports. Ms. Arflin holds a Masters in Business Administration and a Masters in Counseling Education from the University of Central Florida.
- **Karen Willis**, Principal of Adroit Solutions, will join this project as a contractor to support the technical assistance plan and oversee the development of the contractor training guide. Ms. Willis is a NAWDP certified workforce development professional with over 25 years of experience administering, managing and designing human services programs at the state and local levels. Ms. Willis will be responsible for validating, refining, and executing the technical assistance plan. Additional expertise will be selected utilizing the extensive array of professionals identified previously through Learning Link's competitive procurement process. Learning Link is the workforce development training institute for the State of Florida. Additional expertise not previously identified by

Learning Link will be procured as needed. Ms. Willis holds a Masters in Public Affairs from Indiana University.

Supporting the team will be **Rob Rains**, President of UWB, **Suzanne Sparling**, Vice President for Communications, and **Charlie Sanders**, Vice President of Finance and Administration. All resumes are available upon request.

d. History of One Stop Partnerships. UWB has been a partner in the Brevard Job Link for over 7 years, bringing both resources and insights into our one stop system's design. Among those are joint funding of the web-based information and referral network, joint funding of the Together in Partnership needs assessment and community assets study for services to at-risk youth, and design and production of the "Help for Hard Times: A Laid Off Worker Resource Guide".

e. Relationship with Local and State Workforce Boards. An active supporter of local workforce initiatives, Mr. Rains has served as a BWDB board member for over 7 years and is a member of the BWDB Better Jobs/Better Wages Committee. Mr. Rains will serve as primary liaison to the board. Ms. Willis is also involved with BWDB having recently completed a portion of the community audit recently undertaken by the board. Ms. Willis also continues her involvement at the state level through participation in teleconferences, statewide meetings, and discussion forums and will serve as primary liaison to the State Workforce Board.

## **2. Description of Proposed Program**

Our entire approach to this grant award is technical assistance, incorporating real life experiences as recipients of public funding. As such, over 60% of our grant request or \$300,000 (\$15,000 for each of 20 subgrantees) will be reserved for the purchase of

hardware, software, and internet access as well as resource materials to establish mini-career centers at FB/CB organizations. Doing so will immediately open up 20 new access points for community residents and employers to the local one stop system. A portion of each subgrant will be reserved to cover the cost of personnel associated with the mini-career center. Once selected, these 20 subgrantees will be eligible to compete for an additional \$25,000 as supplemental funding to support established social service offerings. This strategy allows each of these subgrantees one additional opportunity to engage in a procurement action during the award period. Our intent is to assist the subgrantees to adopt sound workforce development practices associated with promoting self-sufficiency as part of their institutional culture and congregational mission.

a. Steps to Take Advantage of Partnership and Participation Opportunities Offered Under WIA. WIA's strength is its focus on involving any and all community agencies able to enhance one stop services. Yet, few FB/CB organizations have successfully presented their credentials to become true partners in the one stop service delivery system. Our dialogues with community leaders, spiritual and secular alike, evidences frustration with the status quo. All parties clearly recognize the inherent advantages of tapping into FB/CB organizations. Resources under this grant award can make that possible. The benefits go beyond organizational relationships, however. FB/CB organizations are home to many job seekers *and employers* who may hesitate to use the local one stop delivery system. Research shows people seek services from trusted organizations. By tapping into these prospective partners, Brevard County can open the door to workforce development tools not yet accessed by large numbers of our residents and employers. For example, many employers attending religious services can now

become aware of opportunities available through these on-site mini-career centers, as well as additional resources available through the one stop system. Further, as critical prospective partners, FB/CB organizations volunteer to bring their talents and commitment to the table only when they see the value in doing so. As such, FB/CB organizations offer a perspective not unlike the customers of a one stop delivery system. The level of involvement by these organizations can serve as a proxy for the degree to which the system is open, responsive, and non-bureaucratic, acting as a lightning rod for improvements within the one stop delivery system.

b. Methodology of Identifying Prospective Subgrantees and Description of Outreach Strategies. UWB has already invested significant corporate resources to establish the first exhaustive database of faith-based organizations in Brevard County. At its core is a listing of 603 congregations including para-church ministries (faith-based organizations not affiliated with a specific congregation). This listing has been refined and updated by checking against three area telephone directories, making hundreds of direct telephone calls, and actively soliciting information on small minority congregations, especially Hispanic, that are not listed in other directory sources. We already have direct relationships with at least 100 of these organizations through our efforts to engage the spiritual community in human services, including 70 ministers representing more than 50 faith-based organizations who participated in the Youth Pastors Outreach Summit referenced previously. Additionally, 25 FB organizations are represented on the UWB Youth Pastors Advisory Board, which meets monthly to guide the work of our faith-based initiative coordinator. Multiple strategies will be used to ensure broad awareness of this grant award and associated subgrantee potential. Among them are press releases

in the local daily newspaper and its three weekly regional publications; snail mail and e-mail of the our FB/CB organization RFP to the entire UWB faith-based organization mailing list; personal one-on-one contact with leaders of each of the five ministerial associations active in Brevard County; posting of the RFP on the UWB web site; and, hosting a bidder's conference to respond to prospective subgrantee questions.

c. Criteria and Methodology for Awarding Subgrantees. UWB proposes an abbreviated procurement process with provisions similar to those in the USDOL small FB/CB organization RFP. The abbreviated solicitation will clarify the **required** activities. Specifically, each of the 20 subgrantees will agree to:

- Establish a mini-career resource center on-site;
- Identity at least one individual who will attend Train the Trainer sessions on using the Brevard Job Link website and its associated resources (America's Career Kit, resume writer, job order bank, Choices, etc.) Our intent is to build the knowledge base of a selected cadre of individuals who can, in turn, train other interested individuals within their organization;
- Participate in scheduled group technical assistance including a county-wide better practices conference;
- Recruit a minimum of one additional faith-based or community-based organization committed to participating in the group technical assistance; and,
- Continue the linkages initiated with this funding at the conclusion of the grant award.

A proposal review team will be convened to rate proposals. Input of the advisory council will be sought prior to team selection. Subgrantee selection will be based on:

- the size of the organization consistent with the grant award parameters;
- willingness to participate in the required activities;
- geographic location to ensure impact on all four major population centers within the county;
- diversity in populations served based on input from BWDB identifying specific neighborhoods/special populations with the greatest need for enhanced access to the one stop system; and,
- likelihood the sub-grantee can attain and maintain successful implementation of project objectives at the conclusion of the grant award.

Contracting will be on a cost-reimbursement basis with monthly billings unless otherwise negotiated.

d. Approach to Subgrant Management, Technical Assistance and Mentoring Including Description of Capacity Building Efforts to Establish/Strengthen Administrative Potential. Our overall strategy as an intermediary is simple and subgrantee-centered. Our entire approach is technical assistance based, designed to provide subgrantees with real life experiences as recipients of public funding. As such, all costs, except those specific to administering the grant award with USDOL, will be charged to the program cost category. Our *subgrant management* strategy begins with outreach to increase awareness of the subgrantee RFP. Here we will model better practices in prospective bidder outreach and RFP design, review and subgrantee selection. Through this approach, prospective subgrantees will have the opportunity to see first hand the procurement process, their respective strengths, and improvements opportunities. Each proposing organization will receive a summary outlining scores against selection criteria

and highlighting areas for improvement. Once selected, subgrantees will continue to experience sound principals of subgrant management designed to ensure process integrity, clarify expectations, address challenges, celebrate excellence, and practice proposal development through yet a second procurement opportunity. We will also conduct both desk-top and on-site reviews to acquaint subgrantees with the practice of program monitoring. Our approach will serve as an “early warning system” against problem areas as well as an opportunity to identify and share better practices. For this grant award, we will increase our regular meeting schedule with subgrantees, particularly senior leaders to fine-tune our efforts. Agendas will be collaboratively developed. An electronic list serve will be explored as a means to relay information and distribute better practices. Additionally we will explore effective methods to provide notice of funding opportunities to acquaint our subgrantees with the process and priorities of potential funders. Capacity building *technical assistance* begins immediately upon selection, when all subgrantees and their previously identified partner(s) will be invited to a series of sessions to acquaint them with the specifics of the project, and ascertain common issues associated with public funding as well as targeted issues related to better service delivery practices. All remaining group size technical assistance sessions will be publicly announced to encourage participation by other interested community organizations challenged by the same concerns but not part of the core subgrantees and their partners. Qualified subject matter experts will lead these sessions and employ varied methods appropriate for adult learners. All sessions will have stated, quantifiable objectives keyed to relevant research and case studies to promote hands-on learning. Ample time for networking will be included. The final training plan will incorporate both administrative

and programmatic issues related to workforce development systems and skills. The needs and interests of the subgrantees and their partners will drive specific topic areas, however, we anticipate providing the following:

- Technological assessment of current capacity to support the mini-career center and other linkages with the local one stop system
- Demystifying public funding
- Accounting for public funding
- Accessing internet-based workforce development resources
- Writing award winning grants
- Series of skill building workshops such as how to set up soft skills, GED and ESOL programs, quality mentoring of youth and adults, and other similar topics

The intent of the group size training is to address common issues of interest as well as weaknesses most often identified during state and federal monitoring of publicly funded providers. Real life examples will be pulled from past BWDB reports as well as reports from sister workforce regions across the state. As mentioned previously, a second procurement opportunity will be used as part of the subgrantee technical assistance. Because the initial RFP will be highly structured, this RFP will allow subgrantees to respond to a more open-ended solicitation. A total of \$25,000 (an additional 5% of our grant request) will be reserved for these proposed activities. A mini-RFP will be released during the second quarter, allowing subgrantees to proposed enhancements to their current social service offering. Proposed activities may include, but will not be limited to, materials to strengthen soft skills training, ABE/GED/ESOL programs, and after-school services. These proposals will be reviewed in a fashion similar to the initial

subgrantee selection process and negotiated separately with priority given to cost effectiveness and evidence of measurable outcomes. In addition to group training, individualized technical assistance will be offered. Each of the subgrantees will have the opportunity to craft a plan to address individual organizational concerns. Subgrantees will also have the opportunity to request an organizational *mentor*. Mentors will be recruited from the UWB board, member agencies, and current subgrantees. Assignments will be based on the specific needs of the subgrantee and the experience of the mentor. Multiple parties interested in seeing this program implemented in our community have provided letters of support. Additional letters are available upon request.

e. Method of Evaluation and Documentation of Activities. Our proposed approach has been designed to increase (1) the number of FB/CB organizations participating in the Brevard Job Link one stop system, (2) the number of service delivery points from which job seekers and employers can access the Brevard Job Link one stop system, (3) the total number of individuals assisted by the Brevard Job Link one stop system, and (4) the capacity of project subgrantees to sustain their involvement in the Brevard Job Link one stop system at the completion of the grant award. Our proposed evaluation approach addresses these objectives in a number of ways. First, we will work with BWDB to establish baselines for objectives 1, 2 and 3. Once the baselines are established, we will track the number of faith-based and community-based organizations participating in the project, the number of mini-career centers established, the number of jobseekers and employers accessing these mini-career centers, and the number of successful referrals made to additional Brevard Job Link services. Additionally, a standardized tool will be used to assess customer satisfaction related to the accessibility and content of the mini-

career centers. Options under consideration to track jobseeker and employer usage include the newly acquired MetSys web-based case management system. Objective 4 will focus on documenting knowledge and skill gains resulting from technical assistance and mentoring. Our design includes pre- and post-testing of key principals from each subgrantee to ascertain baseline knowledge related to the administration and management of publicly funded services. Each group and individualized technical assistance session will include an evaluation to determine increases in knowledge and skills associated with the topic area. A consolidated post-test will be designed to assess the overall learning gains and satisfaction with the assistance offered during the grant award period. Using core material from the technical assistance sessions, the UWB will also create a user-friendly contractor training manual for use by BWDB and other workforce boards as they continue to reach out to other agencies committed to enhancing the self-sufficiency of their local residents. Additionally we will seek opportunities to share our experience with other workforce development professionals as part of our commitment to strengthen one stop service delivery. Of particular interest is participation as presenters at the 2003 NAWDP conference and others of specific interest to USDOL.