



**Children's Board**  
HILLSBOROUGH COUNTY

[www.ChildrensBoard.org](http://www.ChildrensBoard.org)

## Agency Capacity Checklist

Updated August 25<sup>th</sup>, 2022

The following capacity checklist was developed to assist in the planning phase of developing an organization's response to a Request for Proposals (RFP). This is a comprehensive approach to build upon infrastructure and current strengths of the organization. This includes having the ability to adhere to administrative data collection/outcome reporting expectations, fiscal requirements, and contractual program performance.

The following are some organizational infrastructure items associated with having the resources to be successful when applying for funding.

<b>GENERAL ORGANIZATIONAL INFORMATION</b>	<b>YES</b>	<b>NO</b>
Is the organization a non-profit 501-C-3, governmental entity or incorporated not for profit qualified to do business in the State of Florida?		
Do you have an active Board of Directors that meet regularly?		
Do you keep minutes of each board meeting?		
Is there someone aside from the Executive Director dedicated to keep track of finance responsibilities.		
Do Board members and agency leadership have a diverse set of skills and professional backgrounds that compliment each other as well as the needs of the organization?		
Are the workforce or volunteers representative of the demographic make-up of Hillsborough County and/or the client population served?		
Are background checks required of all direct service employees?		
Do you have an organizational chart that depicts lines of authority?		
Does the organization have a website?		
Does the organization have secure email?		
Does the organization have reliable internet connectivity?		
Does the organization have a clearly articulated mission and vision that reflects its values and purpose?		

<b>DATA COLLECTION AND REPORTING</b>	<b>YES</b>	<b>NO</b>
Does the organization have an intake process that obtains consent, gathers basic participant information, and assesses needs?		
Is the organization capable of collecting participants demographic information?		
Does organization have experience using instruments/tools to measure the effects of services provided to consumers (also known as outcome data)?		
Does the organization have the information technology systems to store confidential information?		
Does the organization use satisfaction surveys to obtain feedback from consumers?		
Does the organization use an evidence-based model, evidence informed curriculum, or other best practice?		
Does the organization currently have dedicated staff to collect and report on outcomes?		

<b>FINANCIAL CAPACITY</b>	<b>YES</b>	<b>NO</b>
Does organization have an agency operating budget for the current year?		
Does organization have a budget specific to the program it is seeking funds for?		
Reimbursement from CBHC is typically monthly: Does organization have the cash reserves to pay for and invoice the Children's Board of Hillsborough County using the cost reimbursement model?		
Does your organization have a current audit including a management letter and most recent financial statements?		
If the organization does not have an audit, are there ANNUAL Financial Statements reviewed and approved by the Board of Directors?		
Does the organization have written financial policies and procedures?		
Does the organization have internal controls in place?		
Does the organization have someone on staff with financial management/budgeting experience, as well as a sufficient understand of basic accounting principles in order to effectively manage the fiscal component of a grant?		
Does the organization have a process to approve expenses prior to submitting a reimbursement request?		
Does the organization have a financial planning and analysis process?		
Is the organization currently managing grant funds from any source?		
Does the organization have technology systems in place for reporting financial information?		

INSURANCE REQUIREMENTS	YES	NO
Does your organization have the insurance coverage as referenced in the General Terms and Conditions?		

**Additional Documents to Review:**

- Demographic Data Collection Requirements
- General Terms and Conditions that will be part of the CBHC contract
- Fiscal Handbook: Note: 20% of the total direct expenditures can be budgeted in the administrative/indirect budget line if an agency budget is under \$750,000.
- Refer to specific RFP released for more information and specific requirements
- If awarded, the Non-Profit Leadership Center offers year-round training.