CCSF SOUTHEAST NONPROFIT RESOURCE FAIR
2014

CONTRACTS, GRANTS AND PROPOSAL WRITING
WITH
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TYPES OF SOLICITATIONS

- **RFP**: When a Request for Proposals (RFP) is issued, a department usually has a specific project and dedicated funds available.

- **RFQ**: When a Request for Qualifications (RFQ) is issued, a department may or may not have funding immediately available. The purpose of the RFQ is two fold: to understand the range of applicants that may be able to provide the service/set of services described in the RFQ, and to “pre-qualify” a variety of vendors that may eventually be selected to provide the service. There are times when a department issues an RFQ, and does have funding available.

- **Grants vs. Contracts**: Both a grant and a contract give the CCSF the authority to partner to reimburse an entity for professional services performed. Generally speaking the city uses a “grant agreement” when contracting with a non profit, and a “contract” with a for profit. There are differences, sometimes a contract will have a “Fees per unit of service budget,” whereas a grant will have a “line item budget.” Monthly reimbursement is generally the same for both.
Request for Proposals (RFP)
- Funders release RFP guidelines with a specific deadline, outlining the specific funding goals, eligibility and desired outcomes.
- Applicants create proposals fitting these guidelines

Letter of intent (LOI)
- Funders sometimes request that applicants submit a required or courtesy letter of intent as part of the application process, which includes the following: Complete applicant contact information, reasons for applying, a short project summary, and their fit with the funding and eligibility criteria.

Proposal Submission and Review Timeline
- Applicants must submit proposals by the exact time detailed on the RFP. There are no exceptions. Following, the RFP issuing department does a technical compliance review, and then convenes an independent reader panel to review/rate proposals.
Convening the review panel: The issuing department must convene a panel of experts to review proposals. There are usually 3 – 7 people reviewing the proposal.

Panel Responsibilities: The panel is charged with assessing and scoring how well an applicant answered the RFP questions. The panel is given a score sheet that directly mirrors the questions posed in the RFP. There is usually a scoring range from 1 – 5, with 5 demonstrating a perfect answer. The panel can only assess information that is included in the proposal. That is why it’s so important to clearly answer RFP questions.

Next Steps: The issuing department reviews the scores of each panelist, and derives an average score for each applicant. Often, but not always, the applicant with the highest average score is eligible for an award.
THE APPROACH

DO YOUR RESEARCH
- WHO, WHAT, WHY, WHEN AND WHERE
- Investigate current or former vendors or others who have been successful.

READ THE GUIDELINES
- Goals/Priorities
- Eligibility
- Criteria for review
- Expectations

CALENDAR
- Try to plan in advance.
- This is rarely a fast process.

CONTACT THE STAFF
- Reach out. Early!
- Get feedback
- Utilize any available technical assistance
THE APPROACH - A FEW TIPS

**Tip 1:** Proposal writing is not creative writing, it is technical writing that requires that an applicant demonstrates an aptitude to: A) Implement and sustain the services, B) Manage the financial and administrative aspects of the work which include monthly reimbursement submissions, and regular reporting.

**Tip 2:** Review due dates, eligibility, and submission requirements first things first. There may be work, like becoming an approved city vendor, that needs to be done prior to the proposal submission.

**Tip 3:** Some applicants choose to include information and documentation that is not requested by the RFP/RFQ. This isn’t necessary. No extra points can be given, and the review panel really can’t review any non-required information. In short, exactly align all answers and information with RFP/Q requirements.

**Tip 4:** Remember that you are the expert. This is your time to convey your expertise, experience and skills.
PROPOSAL SECTIONS

- Project summary
- Eligibility, contract amount, and contract term
- Proposal submission timeline, e-questions, and pre-proposal conference
- Minimum agency requirements
- Scope of work/Narrative
  - Includes Budget
- Proposal submission contents
- Proposal submission requirements
- Terms and conditions for receipt of proposals
- Contract requirements
- Protest procedures
- Appendices
The Scope of Work/Narrative is the meat and potatoes of the proposal. It is almost always the section with the greatest point value.

The Scope of Work usually includes background information on the services to be rendered, objectives and goals information, and budget information.

It is helpful to review the submission content questions prior to reading the scope of work/narrative. The submission content questions provide the line of questions or framework for your scope of work answers.

We can’t stress enough – directly answer the submission content questions. Many times agencies include information that they “think” the issuing agency might be interested in – the issuing agency directs the review panel to score on how well applicants answered specific RFP/Q questions – all non pertinent information is not reviewed.

Let’s look at a sample Scope of Work/Narrative and Submission Content section of an RFP.
Almost every solicitation will require that you include project objectives (sometimes called deliverables), and goals.

**Objectives/Deliverables** convey process information like “the number of times per week a class will be held, the number of lunches to be distributed, or the number of individuals to be served.

**Goals** convey the outcomes or what is the long-term impact on people, or systems.

**For example:**

Project Awesome will serve 100 clients in the Great Employment Program. Is this an objective/deliverable or a goal?

Of the 100 clients in the Great employment program, 65% will be placed in a job aligned with the client skills and interests. Is this an objective/deliverable
Budgets should be the concretization of your project narrative. You are translating your narrative into costs and needed income.

They should
• add supporting detail,
• demonstrate that the project is feasible, projected income is reasonable and your cost projections are realistic.
• show a balanced budget. Your budget should not reflect a deficit. If there is a projected surplus, it must be from earned income streams. Surpluses cannot come from grant funds.

They should not
• throw in new elements or neglect important parts of your plan!

Budget notes
Provide transparency and detail in your calculations. This is where you can anticipate and answer potential questions
SAMPLE BUDGET

See attached budget sample

Budget tips:

• Usually budgets are completed in excel. Excel helps to ensure that budget math is correct. It is still important to make sure all of the math is accurate.

• Standard budget information:
  • Personnel
  • Fringe and payroll taxes
  • Operating Expenses
  • Indirect/Overhead (usually at 10%-12% of personnel costs)

• The budget should be very closely aligned with the scope of work. If the scope of work describes a garden project, the budget should include gardener expenses, and plant supplies, or if the scope of work describes a reentry case management program, the scope of work should describe case management and clinical staff, as well as client and program supplies needed to help clients reach the goals of the program.
SUBMISSION CONTENTS/REQUIREMENTS

The Submission Contents and Requirements sections is really important. This section describes the exact “kind of” information you should provide in your proposal, and “how to assemble” your proposal.

Again, this section literally spells out what to include in a proposal. Answer the questions exactly. The submission contents may include:

- Executive summary
- Proposal narrative (also called the scope of work)
- Organizational qualifications
- Staff qualifications
- Budget

This section will also direct you as to “how to package” the proposal: “Use 1” margins throughout the proposal, double space, etc.” If you don’t package your proposal correctly it may not be “technically compliant,” and not eligible for reader review. Additionally, if you don’t answer the questions exactly, and in an orderly fashion, the readers may score the proposal lower. The more you follow the bid instructions, the greater the likelihood you will move on to reader review, and the greater the likelihood that your proposal will receive a competitive score.
GLOBAL TIMELINE – FROM SUBMISSION TO AWARD

• Submission to technical review – Up to 1 month

• Panel review – Up to 2 months

• Final Decisions – 2 weeks to a month

• Contracting process – 6-8 weeks contingent on the size of the project. Add another month if it is a large/complex project.

• Post award Payments – Monthly reimbursement invoicing. The city “reimburses” for expenses, i.e. you have to first pay out the funds, and the city will reimburse. The city has 30 days from the day
OVERALL BEST PRACTICES

- Submit Early
  Submit by the application deadline, if not earlier.

- Complete everything
  Answer ALL the questions and be sure you’re addressing all criteria.
  If you’re skipping things, that’s a sign your project may not fit.

- Proofread for grammar and spelling

- Don’t rush
  If you complete your application in a day, chances are that the reviewers will know.

- No cookie cutter requests
  Plan and tailor your request and grant components specifically for each funder.

- Practice, practice, practice
  The more you write, the better your skills will become; you may not used to writing about your ideas.

- Get feedback
  Ask a friend or family member who is used to reading with a critical eye to review your application and give you feedback.

- Address the criteria
  Demonstrate the criteria for review when writing the narrative.
Questions?