

WELCOME

Amity TPA

Technical Assistance Webinar Winning Proposals

June 28, 2023 – 5 to 6PM PST

jcod.lacounty.gov

amityfdn.org/tpa



LOS ANGELES COUNTY
**JUSTICE
CARE AND
OPPORTUNITIES**
DEPARTMENT

Amity
Foundation
when people gather with good intent

The Amity Foundation logo, featuring a stylized orange circle with a bridge-like structure and a group of people holding hands above it.

Technical Assistance Webinar – Winning Proposals About Amity Foundation TPA

Amity Foundation is dedicated to the inclusion and habilitation of people marginalized by addiction, trauma, criminality, incarceration, poverty, racism, sexism, homelessness and violence.

We strive to improve health, and promote environmental, social and economic justice.

Amity was selected as Third Party Administrator through a competitive bid process and is responsible for distributing funds through the CFCI Funding Opportunities.

La Fundación Amistad se dedica a la inclusión y habilitación de personas marginadas a causa de sus problemas de adicción, experiencias traumáticas, encarcelamiento, pobreza, discriminación racial o sexual, carencia de vivienda, y violencia.

Nos esforzamos por mejorar la salud y promover la justicia ambiental, social y económica.

Amity fue seleccionado como Third Party Administrator a través de un proceso de licitación competitivo y es responsable de distribuir fondos a través de CFCI Funding Opportunities.

Centering Community

We want to take a moment to acknowledge the community and the price paid by individuals that has resulted in responses such as Measure J and the CFCI Funding Opportunities.

At Amity, we use quotes to help us ground our work.

History, despite its wrenching pain, cannot be unlived;
But if faced with courage, need not be lived again.

-Maya Angelou, *On the Pulse of the Morning*

Team Introductions

- **Rebecca Gray**

Grant Administrator, Amity TPA

- **Juan E. Jaime**

IT System Administrator, Amity Fdn.

Agenda

1 – Proposal Writing

What is it?

Resources for Better Proposal Creation

2 Strategies

2 – Project Management Tips & Tools

Before You Start

Tools for Managing Proposal Preparation

Plan of Attack

3 – Year 2 CFCI Funding Opportunity Overview

Attachments

Agenda Item 1: Proposal Writing



What is Proposal Writing?

PROJECT MANAGEMENT

FREE Online Resources for Proposal Writing

- <https://www.youtube.com/watch?v=7iOQKI1wSFk>
- <https://www.bossonabudget.com/my-favorite-resources>
- <https://grantwritingandfunding.com/>
- <https://greaterpublic.org/resources/major-planned-giving/grant-seekers-toolkit/>
- <https://www.youtube.com/@LearnGrantWriting/videos>
- <https://www.youtube.com/watch?v=-V0tYq3nCm8>
- [YouTube - Jessica Venhttps://www.youtube.com/watch?v=hFBRgiyTt7Eble](https://www.youtube.com/watch?v=hFBRgiyTt7Eble)
- <https://www.youtube.com/watch?v=RK3aadRmr90>
- <https://www.youtube.com/watch?v=anBSKk-e8vl>

Other Resources for Proposal Writing

- [The Grantsmanship Center](http://www.tgci.com) - www.tgci.com
 - Project Grantsmanship (<https://www.tgci.com/project-grantsmanship>)
 - \$200 (vs. \$1255 for the regular course)
 - Sept. 25-29, online (usually twice a year)
- [The Center for Nonprofit Management – SoCal](https://cnmsocal.org/) - <https://cnmsocal.org/>
 - <https://cnmsocal.org/events/> (trainings)

Two Strategies for Effective Proposal Writing (1)

1. Develop Goals, Objectives, Outcomes

- How to write a clear goal
- S.M.A.R.T. objectives
- Measurable outcomes

2. Create the Budget

- Personnel
- Fringe Benefits
- Non-Personnel
- Indirect Costs

Two Strategies for Effective Proposal Writing (1)

1. Develop Goals, Objectives, Outcomes FIRST

- How to write a clear goal

-Flip your “Problem Statement”—the need or challenge that your program or project addresses

-Reference a larger community, organizational, or national goal

-Goals are broad and aspirational

Two Strategies for Effective Proposal Writing (1)

1. Develop Goals, Objectives, Outcomes FIRST

- S.M.A.R.T. objectives

-Specific

-Measurable

-Achievable

-Relevant

-Time-bound

Two Strategies for Effective Proposal Writing (1)

1. Develop Goals, Objectives, Outcomes FIRST

- Measurable outcomes

-Outcomes are measurable, and often depend upon data. Outcomes show an increase or decrease in events, conditions, or behaviors.

Two Strategies for Effective Proposal Writing (2)

2. Create the Budget FIRST

- Personnel
- Fringe Benefits
- Non-Personnel
- Indirect Costs

Two Strategies for Effective Proposal Writing (2)

Name of Organization:					
Personnel (salaries / pay)					
Position Title	Hourly Wage	# Hours a Week Worked on Project	# Weeks a Year Worked on Project	Total Wages	Why is this staff person required for your program / project? What will they do?
Program Director	\$ 43.75	5	48	\$ 10,500.00	The Director of the organization provides oversight for the project.
Program Coordinator	\$ 25.00	40	48	\$ 48,000.00	The Project Coordinator performs daily tasks such as record keeping, timesheets, receipts, etc. and monthly reports to Contractor
FRINGE BENEFITS Maximum of 30% of staff salary - this includes medical insurance, workers comp, and employer-paid taxes including social security paid in addition to salary per employee. Input your Fringe Benefits percentage in the next cell (B17) -->	9.00%			\$ 5,424.30	The minimum allowable is 7.65%
Subtotal Personnel				\$ 65,694.30	

Two Strategies for Effective Proposal Writing (2)

Non-personnel (services & supplies)					
	Monthly Cost	# Months (12 max - Year 1)		Total Services & Supplies	Why is this item needed for your program / project? What will it do?
Rent	\$ 2,250.00	12		\$ 27,000.00	Office space is used to plan the project, coordinate the trainings, learn the software
Office Supplies (pens, clips, paper, etc.)	\$ 100.00	12		\$ 1,200.00	Paper, pens, paperclips, envelopes
Communications (cell phones, etc.)	\$ 270.00	12		\$ 3,240.00	Staff office (cell) phones, Zoom
Equipment (computer/printer)	\$ 2,500.00	1		\$ 2,500.00	1 new accounting computers
Staff Training	\$ 7,399.00	1		\$ 7,399.00	Training for new software
Mileage				\$ -	
Supplies for Clients (different from Office Supplies)				\$ -	
Insurance Costs	\$ 1,600.00	1		\$ 1,600.00	New professional liability insurance required for this grant; annual
Subcontractors/Consultants	\$ 1,766.67	6		\$ 10,600.02	Development consultant to help create 2-year plan
Client Stipends/Internships				\$ -	
Transportation				\$ -	
Utilities				\$ -	
Other Costs - list the item and the cost below:				\$ -	
Subtotal Nonpersonnel				\$ 59,039.02	
Indirect Costs 15%				\$ 18,710.00	
Total Project Budget:				\$ 143,443.32	

Agenda Item 2: Project Management Tips & Tools



Project Management – Before You Start

- Read the request for proposals / application all the way through. Print it out if that helps you. Does the request match your program or project? ***Think Critically!***
- Write down any questions you have about the request or application and send them in as soon as possible.
- Make a proposal production timeline (two templates provided). Think about WHO will be needed for WHAT.
- The timeline should include each required element of the proposal, such as:
 - Attachments
 - Budget
 - Questions that require a narrative answer
 - Questions that require numbers, data, dates, financial information

Proposal timeline tool

Name of Funder
 Name of Grant / Contract Opportunity
 Any Other Identifying Information
TIMELINE FOR PREPARATION & SUBMISSION

TASK	POINT PERSON	DEADLINE	STATUS	Notes
Prior to proposal creation				
Register for webinar, application, intent to apply			In progress, complete, late, etc.	
Break down all components of the application and add them below				
Determine if any partnerships will be needed				
Download or access any funder forms that they require (budget form, registration form, etc.)				
Proposal creation - sections and tasks				
Abstract or summary				
Staff needed, staff to be paid				
Any staff biographies or job descriptions needed				
Budget and any budget narrative				
Narrative sections, such as mission statement, org history, program description (add lines as necessary)				
Required attachments				
List all required attachments below, add lines as needed. Make due dates for the attachments well in advance of the proposal deadline.				
GOAL SUBMISSION DATE (not the deadline! Before the deadline)				
Troubleshoot any issues with submission				
Final Deadline for Grant Submission			Drop-dead due date here!	

Proposal production plan tool

NOFO Name and Number			Status							Who Is Responsible						Notes
Name of Program / Project to be Funded			Needed	In Progress	Signature Needed	Completed	PDF / Copy Created	PDF / Copy Uploaded / In Binder / Unloaded for Subm.	Partner in Task	Pat. name listed	Pat. name listed					
Item Name	Pg. # (of application)	Description														
Prerequisites / eligibility																
Application components																
Attachments																
Project narrative breakout																

Proposal planning agenda template

- Consider.... *A meeting with your team to discuss a strategy for a winning proposal.*

Template for Proposal Production Meeting Agenda

Meeting Title / Title of Opportunity:
Date:

Meeting Purpose:
Topics: (1)
(2)
(3)

Topic	Notes	Action Commitments
From (1) above (XX minutes) <ul style="list-style-type: none"> • Evidence • Supports • Usability • Need • Fit • Capacity to implement 		<ul style="list-style-type: none"> • <i>List who will do what</i>
From (2) above (XX minutes) <ul style="list-style-type: none"> • Timeline • Scoring Matrix • Departments <u>involved</u> • Attachments needed 		
From (3) above (XX minutes) <ul style="list-style-type: none"> • Program Design • Staff Involved • Budget • Subcontractors <ul style="list-style-type: none"> ◦ Description of sub work • Questions for funder 		
Next Steps (XX minutes) <ul style="list-style-type: none"> • 		

Boilerplate proposal template

Potential Grants/Applications/Contracts

You can use the table below to list the applications, funding or grant opportunities, or contract opportunities that are a good fit with your program or project.

Source	ID	Website	Amount	Due Date	Need to complete	Funding Date
Ex.: Year 2 CFCI Funding Opportunity	Program Area XX	www.amityfdn.org/tpa	TBD	TBD	Attend webinar, attachments, online application	TBD (2023 – 2024)

Information for Proposal Sections

Here you can develop text that you may be able to cut and paste into your proposals.

1. Summary of Proposal (not always necessary)
2. Organizational Overview
 - a. Organization's Mission Statement
 - b. Brief history of the organization—when it was formed, where it operates, what need in the area does the organization target, leadership and/or key staff
 - c. Overview of the programs that the organization delivers, for how long, how many people served

Plan of Attack

- **FIRST:** Address eligibility issues. Do you have to be a business in Good Standing in order to apply? If the issue can be corrected, do it first!
- Do you require letters of support, anything notarized, or any exhibits that need to be signed by people who are hard to pin down? Put these together next.
- Do you need job descriptions or staff bios? Begin collecting them.
- And the last **FIRST** thing: Attachments. Gather all required attachments in one location **BEFORE** you begin writing your proposal.

One More Word on Attachments


An Incomplete List of Required Attachments

1. Organizational documentation
 - a. Unique Entity Identifier (for Federal grants, register at SAM.gov)
 - b. IRS 501c3 Letter of Determination .PDF
 - c. State 501c3 Letter of Determination .PDF
 - d. Articles of Incorporation / Bylaws .PDF
 - e. State of CA Certificate of Charity Registration .PDF
 - f. State of CA Certificate of Good Standing (renew every 6 months) .PDF
 - g. State of CA Statement of Information (renew every 2 years) .PDF
 - h. City Business Tax Registration Certificate .PDF
 - i. LA County Vendor Registration .PDF

2. Financial docs
 - a. Voided check (you need this less and less, but Bank of America still requires one for their funding opportunities!)
 - b. Current year annual budget approved by Board, and a copy of the minutes where the Board approved the budget
 - c. Projected year annual budget approved by Board, and a copy of the minutes where the Board approved the budget
 - d. Most recent audit
 - e. Most recent 990s
 - f. Fringe benefit cost breakdown per employee (HR can usually figure out this percentage)
 - g. Quarterly Balance Sheet & Profit and Loss statements (BS / P&L)
 - h. Most recent unaudited financial statement for the past year if audit not available
 - i. Budgets for each department and/or program in the organization, with personnel

Seven Days Before the Due Date

- Mark this date on your calendar.
- Do not schedule any doctor's appointments, vacation days, teacher / parent meetings for this entire week.
- Two days before the due date, package your proposal. Copy and paste your answers to online questions from a separate word document that you completed WEEKS ago, make all copies needed if you are mailing—remember there will ALWAYS be a problem with submittal.
- Begin submittal at least 48 hours before the due date.
- Don't laugh this off! 😊😞💣💀



Agenda Item 3: Year 2 CFCI Funding Opp Overview



Application Checklist

Document + Information-on-Hand Checklist

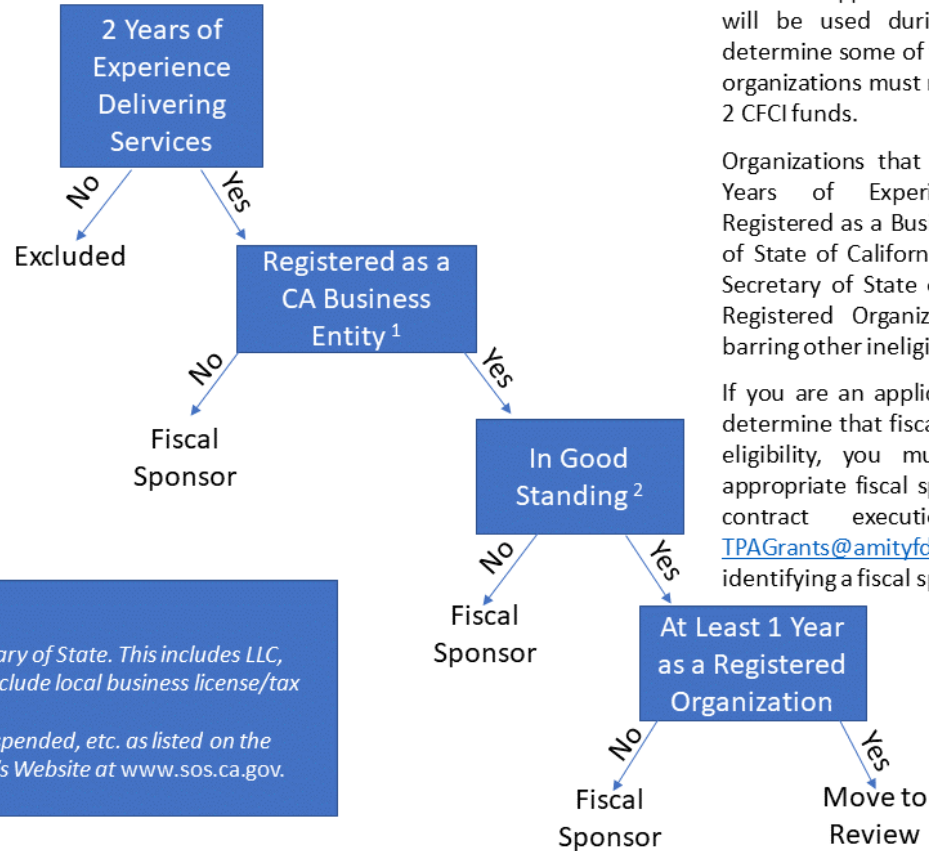
- Organization's most recent tax return (Form 990, 2022 preferred)
- Proof of professional status (501c3, LLC, Fiscal Sponsor Agreement)
- Insurance documentation (not scored!)
- Demographic breakdown of organization's leadership (Leadership Characteristics Template – form provided)
- ZIP Code(s) served (10 maximum)
- Funding request and project plan: Desired amount over 3 years, staffing, milestones, timeline, outcome (impact), etc.
- Budget form (Budget Form Template – form provided)

Eligibility

- Open to justice-focused organizations that have provided direct services to individuals and families for 2 years or more.
- This includes nonprofits, business entities, faith-based organizations, and organizations with fiscal sponsorship.
- All applicants (or fiscal sponsors) must be registered with the California Secretary of State & in existence for at least 1 year.
- All applicants (or fiscal sponsors) must have a status of Good Standing with the California Secretary of State.
- All applicants must be located within the County of Los Angeles and serving LA County ZIP codes.

Do I Need A Fiscal Sponsor?

Eligibility Flow Chart – Path to Fiscal Sponsor



After the application deadline, the tool to the left will be used during preliminary screening to determine some of the standards of eligibility that organizations must meet in order to apply for Year 2 CFCI funds.

Organizations that meet the requirements of 2 Years of Experience Delivering Services, Registered as a Business Entity with the Secretary of State of California, In Good Standing with the Secretary of State of California, and 1 Year as a Registered Organization, will move to review barring other ineligibility.

If you are an applicant using this chart, and you determine that fiscal sponsorship will secure your eligibility, you must have an approved and appropriate fiscal sponsor agreement in place by contract execution. Contact Amity at TPAGrants@amityfdn.org if you would like help identifying a fiscal sponsor.

Notes:

1. Registered with CA Secretary of State. This includes LLC, Corp., 501(c)(3), and must include local business license/tax license (if applicable).

2. Cannot be terminated, suspended, etc. as listed on the California Secretary of State's Website at www.sos.ca.gov.

Requirements

- Four attachments: 1. the organization's most recent tax return (Form 990), prefer 2022; 2. documentation of the organization's business / legal status; 3. insurance documentation; 4. characteristics of the applicant organization's leadership.
- Proof of insurance will be required before award contracts can be executed. Required insurance limits will be provided on the application.
- Applying organizations and proposed projects must be located within the County of Los Angeles. Organizations must be in Good Standing.
- One application per organization accepted.

Insurance to Contract – DO NOT BUY YET

- 1MM Commercial General Liability; policy must name LA County, its agents, and Amity as additional insured
 - \$2MM General Aggregate
 - \$1MM Products / Completed Operations Aggregate
 - \$1MM Personal and Advertising Injury
 - \$1MM Each Occurrence
- Professional Liability – Errors and Omissions
 - \$1MM per claim
 - \$2MM aggregate
- Automobile Liability (if applicable, for instance, transporting clients)
 - \$1MM Bodily Injury and Property Damage for each single accident
 - Includes owned, leased, hired, and/or non-owned automobiles
- Employers' Liability / Workers Compensation
 - Coverage with limits not less than \$1MM per accident
- Sexual Misconduct
 - Limits not less than \$1MM per actual or alleged claim of sexual misconduct and/or molestation, abuse, harassment, mistreatment or maltreatment of a sexual nature
 - \$1MM aggregate

Selection Process

- Organizations must apply through the online application portal (available at the www.amityfdn.org/tpa website).
- Applications will be reviewed and scored by independent reviewers using uniform scoring criteria.
- Organizations with annual operating budgets of less than \$1,500,000 shall be prioritized for award.
- Organizations serving high-need areas of Los Angeles County shall be prioritized for award.
- Organizations with budgets larger than \$1,500,000 will be considered after smaller organizations. Larger organizations that subcontract will be prioritized among the remaining larger organizations for awards, subject to available funding.
- Amity may clarify information in a submitted application, including verification through outside sources, site visits, or other measures.
- Evaluation and award processes are considered final.

Scoring

All proposals will undergo a preliminary screening to ensure completeness and that minimum eligibility requirements have been met.

Screening	Total Points Possible
Application is complete; organization is viable & eligible	Pass / Fail
Organization has an annual budget under \$1.5 million and has never been funded by LA County	10 Points
Organization is in & serves high-need ZIP codes	10 Points
POINTS AVAILABLE	20 POINTS

Once an application passes screening and is scored for priority, independent reviewers will be instructed to use the following tool to score each proposal. Applications that do not pass screening will be declined. Priority points and external reviewer scores will be added to create a final score.

Scoring Area	Total Points Possible
Organizational experience & capacity	10 Points
Project is achievable and relevant; budget is feasible and reasonable	20 Points
Board/leadership and staff reflect the demographics and experience of the population served	10 Points
POINTS AVAILABLE	40 POINTS

THANK YOU!

Amity TPA

Technical Assistance Webinar

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The recorded technical assistance webinar and all documents will be posted at www.amityfdn.org/tpa

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