

INTRODUCTION TO ERIE COUNTY RFP AND CONTRACTING PROCESSES



Agenda

Overview

The RFP Process

The Awards Process

The Contracting Process

Who's Who?!?

Final Tips and Takeaways

OVERVIEW





Purpose of this Training:

To present an overview of the entire RFP and contracting process for new (or existing/former) agencies funded by the Youth Bureau.

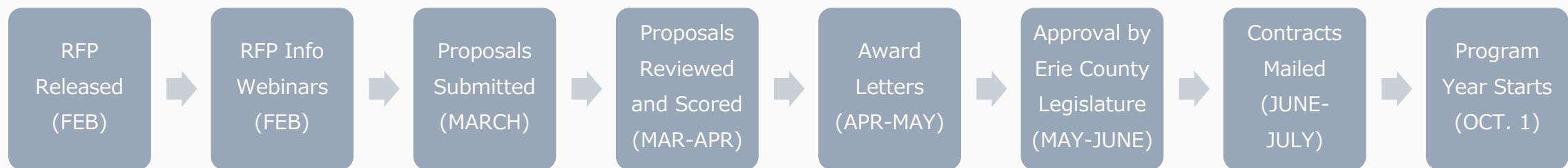
Short Term Goal:

To increase understanding of and reduce confusion or frustration regarding these processes.

Long Term Goal:

To increase the number and quality of proposals for youth-serving programs from effective organizations of all types and sizes.

The Overall Process (YDP, YTS, YSEP)



THE RFP PROCESS



What is an RFP? A Request for Proposals (RFP) is how Erie County invites (youth-serving) agencies to submit proposals for different types of youth programs funded by different OCFS funding streams. It is the County's "grant application" process.

Where can I find County RFPs? RFPs are posted on the [Erie County Purchasing website](#). The Youth Bureau will also post the links on our [website](#). It is strongly recommended that all (youth-serving) agencies subscribe to the RFP notification system. This will ensure you receive an email when RFPs are posted.

How do I submit an application? Proposals (applications) can either be submitted online or in paper form. Online applications are submitted into a system called "OnBase". Links will be provided in the RFP document. Late submissions will not be accepted.

What does the application entail/require? Your primary "application" is on a form called "Appendix A". This form has fillable fields which expand as you type. This is where you explain your program and how you will meet program requirements. There are hyperlinks in the questions for reference information about specific topics (i.e. Trauma-Informed Care, Positive Youth Development, Touchstones, etc). "Appendix B" is your financial information (budget). "Appendix C" is additional information required such as your Audit report, Management Letter, and list of Board of Directors. Each proposal must include a signed "Schedule A" or it cannot be considered.

IMPORTANT!. You will scan and upload each Appendix as one PDF into OnBase (or provide on paper). Title the PDF exactly as instructed in the application. Only upload it ONCE. You will be uploading 3 (three) PDFs. Otherwise, reviewers have a very hard time finding the correct documents to review.

If you mail your application, MAKE A PHOTOCOPY BEFORE YOU MAIL IT!



What happens after I submit the application? Once you submit (or mail) the application (proposal) it is reviewed by a member/team from the RFP scoring committee.

Who scores my application? Proposals are scored by a committee. Scoring committee members include Youth Bureau staff, Youth Board members, and sometimes staff from other DSS units/departments. Each scoring committee has a minimum of 3 scorers.

How is my application scored? Each application is scored using a weighted scoring rubric which includes the following criteria: Overall Proposal, Target Population, Cultural Competency, Program Plan, Performance Measurement, Trauma Informed Care, Program Staffing, Accessibility Plan, Infrastructure, Collaboration, Experience, and Critical Need. You may also be asked to attend a mandatory interview to discuss your program in more detail.

How will I know if I am receiving a grant (award)? You will receive an award letter a few months after you submit your application. The award letter will include your award amount, which may differ from the amount you applied for. The award letter may state that your award is "contingent upon approval by the Erie County Legislature".

What does that mean? All contracts, grants, awards, etc. must be approved by the Erie County Legislature before contracts can be mailed to awardees. We sometimes mail award notifications ahead of this approval so you can begin to plan, but your contract cannot move forward until the final approval is obtained.

THE AWARD PROCESS

Once final awards are decided by the Youth Board and Admin Team, those awards are provided to the DSS Contracts Department.

Award notices are then mailed out.

All awards must be approved by the Erie County Legislature before contracts can be mailed.

Awards (grants) are presented to the Erie County Legislature in a resolution.

Once approved, contracts may be mailed to awardees.

This part of the process can take 2+ months.

Youth Bureau Awards (“Grants/Contracts”)

THE CONTRACTING PROCESS

Contracts are mailed to grantees (awardees) by the Erie County Legal Department.

Your contract will contain your award amount, scope of work, and legal requirements.

Once received, awardees should prepare **three items**:

- Program summary
- Funded program budget ([5005 Budget Form](#))
- Certificate of Insurance listing Erie County as additional insured

Then, sign your contract and have it notarized and mail it back to the **Erie County Legal Department** with the three items above.

Youth Bureau Contracting

Once your contract package is received by the Legal Department, it must go through a series of signatures.

After being received, your contract makes **8 stops** in Erie County for review and signature.

This process can take about 1 month after receipt if the contract is complete.

You cannot be reimbursed for program expenses until your contract is fully executed by our Legal Department.

Key Point: Once received, return your complete contract to the Legal Department **AS SOON AS POSSIBLE**. Do not wait. It is possible that if you wait, you will not be able to receive Q1 payments due to deadlines.

Contracting, Continued



Who's Who?!?

Who's Who in the Erie County RFP and Contracting Processes

RFP Access	<u>Purchasing Website</u> Mail paper applications to Carrie Godfrey, Dept. of Social Services.
RFP Information Meetings and Questions	Youth Bureau Executive Director Webinar links on <u>Youth Bureau website</u>
Contracts and Legal Documents (budget form, COI, Schedule A, updates or corrected forms, etc.)	Lisa Wissing Erie County DSS Legal Department
Assistance with Budget Form, Narrative, etc.	Jen Longo, Principal Clerk Youth Bureau

Final Tips & Takeaways

Answer all sections of proposal completely. Read questions carefully as requirements may have changed.

Submit entire application on time. Late submissions will not be accepted.

Include all required components and signatures in proposal.

Submit paperwork, contract package, etc. in a **timely manner**. Include required information (i.e. budget) on the correct forms.

Respond to requests for information in a **timely manner**.

Ensure you are sending your materials to the correct person. Legal/contracts go to the Legal Department.

This process takes several months. Be timely and also patient!

Reach out to the Youth Bureau office anytime with questions, concerns, or for technical assistance with your contract or program!



Common Issues and Questions

Appendices are uploaded multiple times in OnBase. This causes delays for reviewers.

Appendices are uploaded as many different files. Only upload one scanned PDF for each Appendix. You should upload three PDFs (Appendix A, B and C).

Applications/Contracts are mailed to the wrong person. Applications are to be mailed to the individual and address in the RFP or uploaded into OnBase. Contracts are to be mailed to the DSS Legal Department. Do not send anything to 810 East Ferry. The Youth Bureau, DSS and Legal Departments are located in the Rath Building.

Wrong unit of service used on cover sheet. The unit of service for these grants is "Youth Served".

Contract is not returned in a timely manner. This cannot be stressed enough. When you receive your contract in the mail, attend to it right away and get it back to the legal department. We cannot pay any claims to you until we have a fully executed contract on file. So, if programs start 10/1 and you return your contract 12/1, it may not be executed in time for the 1/15 Q1 claiming deadline!

Budget forms are incorrect. This is common. If you are confused about how to complete the OCFS-5005 Budget Form to include in your contract (required) just call us! We can walk you through what expenses fit into each category. Your claims must match your budget, so it is important that your budget is ACCURATE.

Budget is provided on the wrong form. Budgets must be provided on the OCFS-5005 form. This form can be found on our website. The form can be confusing! Call us for help! Do not send us Excel spreadsheets, Word documents, lists of expenses, etc. or we will discard it and contact you for the correct form.

We reach out to you for information and we never hear back. E-mail or call us back right away if we reach out. We want to finalize your contract and, most importantly, we want to ensure you can get paid!

We have incorrect contact information or contact information has changed. Inform the Youth Bureau right away if any contact information has changed since you submitted your application.

"Can you send me a copy of my (application/contract/budget/narrative/award letter)? I didn't make a copy/lost it..." Maybe but this is poor form. These are important documents you should have copies of. If you submit a paper application, ensure you make a copy before mailing it. Make a copy of your complete, signed contract before returning it to us.

"Can you tell me how much we were awarded?" This information is in your award letter and in your contract. Do not ask us for this information until you have looked at your contract.

"I didn't know that (forms were due/claims are due/paperwork is due/XXX is required)." It is important that you attend all information meetings, review all contract requirements, and review all calendars, schedules and information being sent out from the Youth Bureau.

Upcoming RFP Releases

- January 5: Summer Primetime RFP
- January 21: Primetime RFP Info Session
- February 18:
 - *Youth Development Program*
 - *Youth Team Sports*
 - *Youth Sports and Education*
 - *Runaway and Homeless Youth Services*
 - *Supervision and Treatment Services for Juveniles Program*
- February 24: RFP Info Sessions

Visit the Youth Bureau [website](#) and download the [calendar](#) for detailed information about workshops, info sessions, RFPs, claiming deadlines and more!

QUESTIONS?

THANK YOU!
Kate Hilliman
Executive Director
Erie County Youth Bureau
Katherine.Hilliman@Erie.Gov