



Apricot by Social Solutions Proposal Submission Instructions

Boone County

Children's Services Funding – Identified Youth Needs (RFP #29-23AUG21)

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Contact Information

For questions or to report technical difficulties, please contact:

Boone County	Boone County Community Services	
	573.886.4298	
	communityservices@boonecountymo.org	
	www.showmeboone.com/communityservices	

^{*}Apricot by Social Solutions will not be able to answer questions relating to this RFP.

Introduction

The Boone County Community Services Department utilizes a web-based funding management system, *Apricot by Social Solutions*, through which proposals for community-based funding must be submitted. These instructions are intended to assist organizations in submitting proposals in response to Requests for Proposals (RFPs) issued by the County.

Section 1: Accessing the System

To access the system:

1. Click on or copy and paste the following link to their internet web browser (preferablyGoogle Chrome): https://ctk.apricot.info/auth

PLEASE NOTE

Users **MUST** access the system using either Google Chrome (recommended) or Mozilla Firefox as the internet browser.

2. Enter Username and Password.





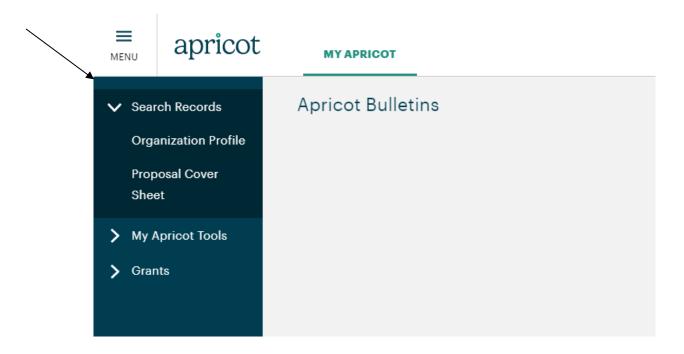
PLEASE NOTE

If your organization does not currently have an Apricot account, please contact the administrator of the RFP to which you are responding. Only one login is granted per organization and logins are valid for all sources of funding. (Boone County, City/County Department of Health and Human Services, and the Heart of Missouri United Way.)

3. Once you are logged in, you will be navigated to your **My Apricot** page. This is one of the main pages users will utilize in navigating the system. Bulletins containing important information also posted on this page.



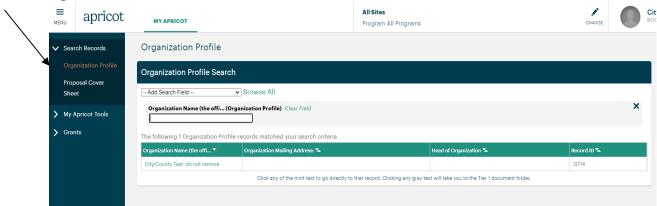
4. You can navigate to your Organization Profile and Proposal Cover Sheet by selecting the arrow beside "Search Records."



Section 2: Organization Profile

Update Your Organization Profile

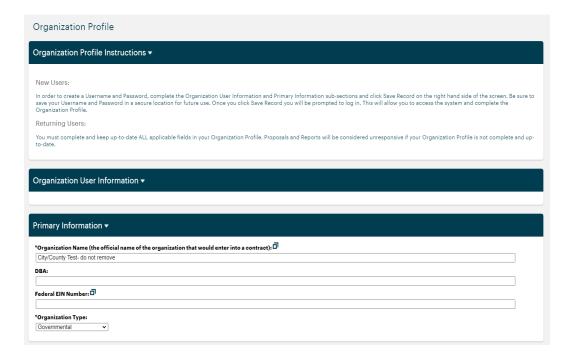
1. In the navigation menu on the left side of the screen, click on **Search Records: Organization Profile**.



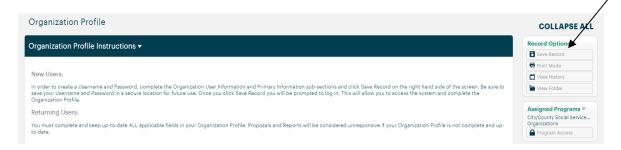
 This will navigate you to your Organization Profile Folder which contains an Organization Profile Search section in which your organization name is listed. Click on your organization name.



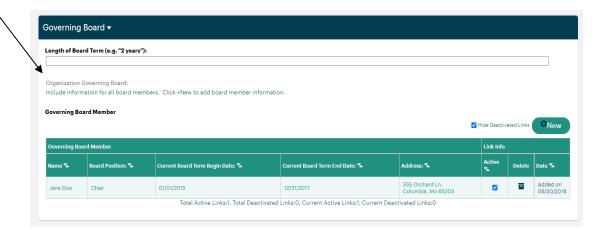
3. This will navigate you to your **Organization Profile.**



4. Complete and update ALL applicable fields in your **Organization Profile**. Reports will be considered unresponsive if the **Organizational Profile** is not complete and up-to-date. Remember to **Save Record** often or your changes will be lost.



5. Be sure to update each governing board and advisory board member by clicking on and opening the record for each board member as complete information for each member is not displayed in the board member quick view in your **Organization Profile**.



6. After clicking on a board member, the board member record will display in a pop-up window. This will allow you to complete all the board member information. Click SaveLinked Record under Record Options as you complete these fields and when it is complete.

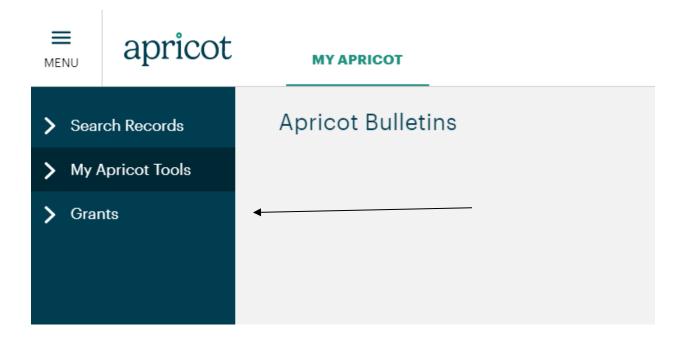
IMPORTANT REMINDER

All sections and sub-sections of the **Organization Profile <u>MUST</u>** be completed or updated before submitting a proposal. Due to the requirements in the funding management system, there are some sections and sub-sections that are not marked required but <u>MUST</u> be completed. Please do not utilize the green check marks, in the Record Save Checklist box, as a guide to completeness. Proposals will be considered unresponsive if any applicable fields are incomplete. Do not hesitate to contact the funder if there are questions.

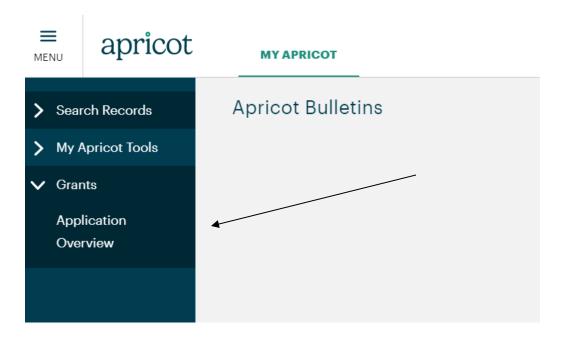
Section 3: Accessing Open RFPs

This section provides instructions for viewing and accessing any open RFPs.

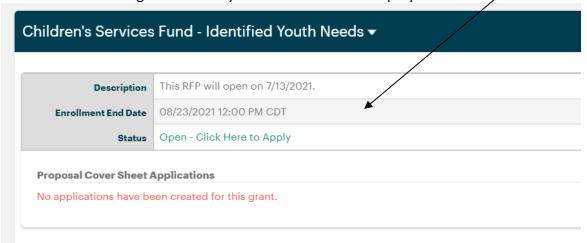
1. To see if there are any open RFPs, click on the **Grants** carrot in the blue navigation menu on the left side of the screen.



2. Click on the Application Overview.



3. This will navigate you to the **Application Overview** page which will list any **Available** (open) RFPs. Click on the **Apply** hyperlink for the applicable RFP to access a **Proposal Cover Sheet**. Your organization may submit more than one proposal.

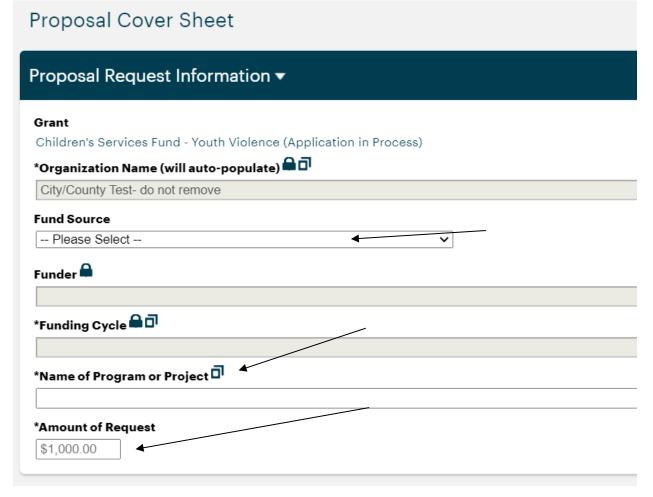


Section 4: Proposal Forms

This section provides step-by-step instructions to access and complete proposal forms.

4.1 Proposal Cover Sheet

 Per the Section 3, clicking on the Apply hyperlink for the RFP for which you would like to submit a proposal will navigate you to a Proposal Cover Sheet. Under the Proposal Request Information section complete the Fund Source (make sure that this matches the RFP for which you clicked apply on the **Application Overview** page), **Name of Program or Program**, and the **Amount of the Request**. The **Organization Name**, **Funder**, and **Funding Cycle** will all auto-populate. Then click **Save Record** in the **Record Options** box.



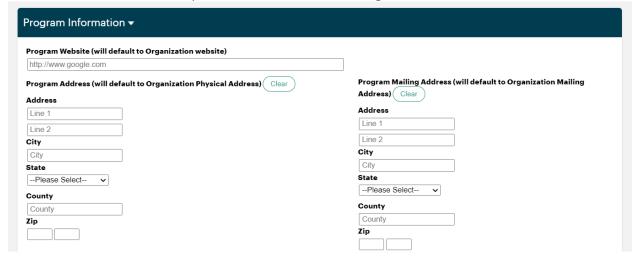
IMPORTANT FUND SOURCE REMINDER

You **MUST** click on the **Fund Source** that says *Children's Services Fund – Identified Youth Needs*. This will ensure that the correct RFP is utilized.

2. Once the **Fund Source** is chosen, depending on the RFP, other fields will appear that require completion. Complete all other information in the **Program Request Information** subsection.



3. Scroll down and complete all the fields in the **Program Information** section.



4. Some RFPs require additional **Attachments** or **Addendums** which must be uploaded in the fields provided in the include **Required Attachments** section. As applicable, these fields must be completed before submitting the proposal.



5. To save the information you have entered in the **Proposal Cover Sheet**, click **Save Record** under **Record Options**.

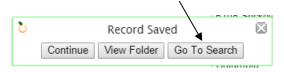


After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

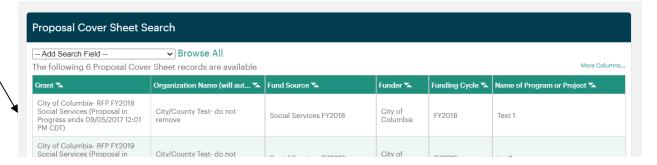
a. If you would like to continue to work on the Cover Sheet, click on Continue.



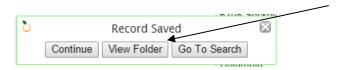
b. If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Folder** that lists all the cover sheets for proposals that the organization has started or completed.



For example, the **Proposal Cover Sheet Folder** for this organization indicates the organization has two **Cover Sheets**. Any one of these may be clicked to access the cover sheet.



c. If View Folder is clicked, you will be navigated to the Proposal Cover Sheet Document Folder which will allow you to begin completing the proposal forms, per Section 4.2 below.



PLEASE NOTE

While not a requirement, it is highly recommended that you complete all the information in the **Organization Profile** and the **Program Cover Sheet** sections before beginning a proposal as information from these forms are auto-populated in the proposal forms. The **Name of the Program or Project** and the **Amount Requested** can be changed or saved at any time in the **Proposal Cover Sheet**.

4.2 Proposal Cover Sheet Document Folder

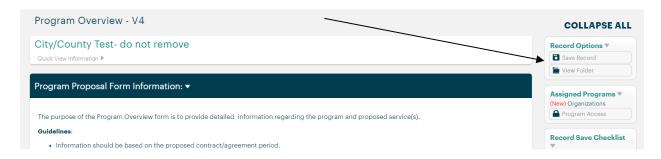
 Once you have completed the Proposal Cover Sheet, you will navigate to the Proposal Cover Sheet Document Folder, per the Section 4.1. The Proposal Cover Sheet Document Folder contains all the information and forms for each proposal.

Proposal Cover Sheet Document Folder City/County Test- do not remove Quick View Information Additional Documents Program Overview - V4 Program Outcomes and Services - V4

To open a form, click on the Actions link arrow on the right-hand side of the box. When
you hover over the word Actions, Create New will appear. Click on Create New to
create a new form.



4. To save a form you have created and/or the information you have entered in a form, click on **Save Record**, in the **Record Options** menu.

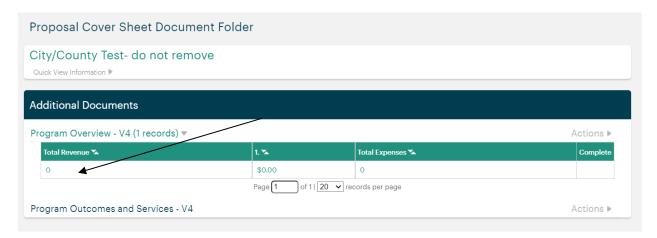


a. After clicking **Save Record**, a pop up window will appear on the screen. This same pop up will appear every time **Save Record** is clicked. Choose the applicable action, as detailed in Section 4.1.

Tip

The red "x" serves as a reminder of what still must be completed in the proposal. It can also be found on the right side of the screen, in the box titled, **Record Save Checklist**, which details each item that still must be completed.

b. Proposal forms can be changed at any time, prior to submitting the proposal, by clicking on any of the fields in the form summary in the **Additional Documents** section. This takes you back to the folder where changes can be made.



4.3 Program Overview Form

Create and complete the Program Overview form on the Proposal Cover Sheet
 Document Folder page by clicking on Program Overview - Actions and then click Create
 New in the drop down. This will open a new Program Overview form.

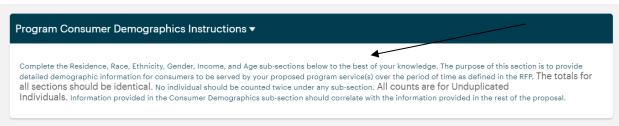
IMPORTANT

Only create one **Program Overview** form. If more than one is created, please contact the Community Services Department at 573-886-4298.

- 2. Start adding information and then save the form. Remember hit **Save Record** frequently so information is not lost.
- 3. Complete the following sections in the Program Overview: Statement of Issue Being Addressed, Program Goal and Overview, Youth Violence RFP Involvement of Youth, Program Access, Program Consumers, Consumer Demographics, Individuals Trained, Program Quality, Program Partnerships and Collaboration, Program Personnel, Program Budget, and the Reference List. Make sure to read all the instructions prior to completing each section.

4. Program Overview Notes:

- a. Statement of Issue Being Addressed: A variety of resources may be used but both items must include data from the Boone Indicators Dashboard: http://booneindicators.org/.
- b. **Program Goal:** Respond to the items in this section.
- c. **Program Overview:** Respond to the items in this section.
- d. **Program Access:** Respond to the items in this section.
- e. Program Consumers/Consumer Demographics:
 - Read the Consumer Demographics Instructions which provides information on how the Consumer Demographics section should be completed.



ii. Complete all the applicable consumer demographics fields.



PLEASE NOTE

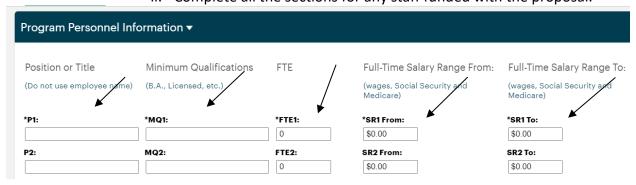
- All counts are for unduplicated individuals to be served by the entire proposed program.
- The Totals in each section should match.
- Be sure to save the information you have entered.
 - f. **Individuals Trained:** Respond to the item in this section (if applicable).
 - g. **Program Quality:** Respond to all the items in this section.
 - h. **Program Partnerships and Collaboration:** Respond to the items in this section.

i. Program Personnel:

 Read the Program Personnel Instructions which provides information on how the Program Personnel Information section should be completed.



ii. Complete all the sections for any staff funded with the proposal.



j. Program Budget:

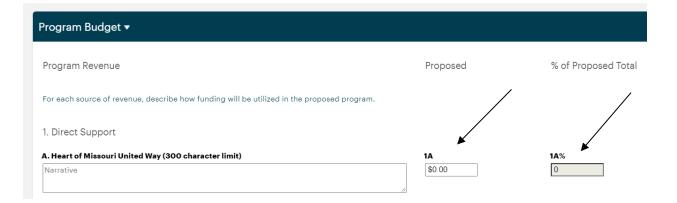
 Read the Program Budget Instructions which provides information on how the Program Budget section should be completed.

Program Budget Instructions ▼

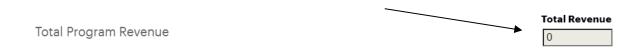
Complete the budget section below reflecting funds to be utilized as described in the RFP and only the funds from other funders that will be utilized to support the proposed program. This should NOT be an overall organizational budget.

For each item for which figures are entered, the corresponding narrative field MUST be completed. Provide information on how other funders will help support the proposed program.

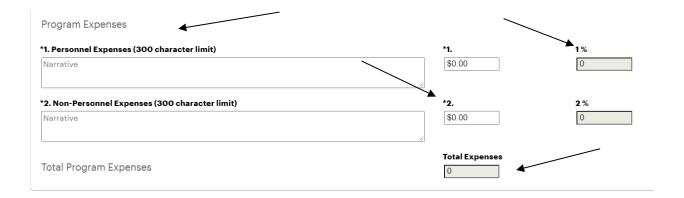
ii. Complete all applicable "Proposed" revenue fields as outlined in the instructions. If a figure is entered in this column, the corresponding narrative field must be completed. The % of Proposed Total column will automatically calculate.



iii. The **Total Revenue** box will automatically calculate as figures are entered in the **Program Revenue** section.



- iv. Complete the **Personnel** and the **Non-Personnel** in the **Program Expenses** section. These expenses are for the proposed program only.
- v. The **Total Expense** box will automatically calculate as figures are entered in the **Program Expense** section.



PLEASE NOTE

- The time period of the proposed year(s) is indicated in each RFP.
- The amount proposed, as indicated on the Proposal Cover Sheet, must match the
 amount entered in the corresponding funding source (A. Boone County Children's
 Services Funding).
- Be sure to save the information you have entered.

4.4 Program Outcomes and Services Form

 Create and complete the Program Outcomes and Services form on the Proposal Cover Sheet Document Folder page by clicking on Program Outcomes and Services - Actions and then click Create New in the drop down. This will open a new Program Outcomes and Services form.

IMPORTANT

Only create one **Program Outcomes and Services** form. If more than one is created, please contact the Community Services Department at 573-886-4298.

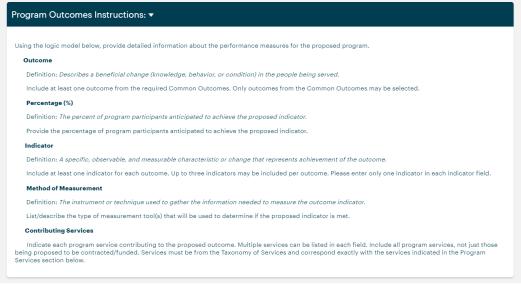
Make sure to read the Program Outcomes and Services Form Guidance, Program
 Outcomes Instructions, and Program Services Instructions sections as a guide for the
 Program Outcomes and Services form.

3. Review the instructions for the **Development/Start Up Service Funding** section. This section may only be used for funding a service on a one-time basis.

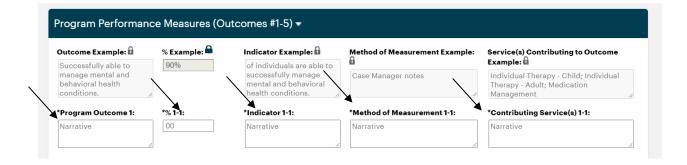


4. Program Outcomes #1-5:

- a. Review the Program Outcomes Instructions. The Program Outcomes should be related to the overall goals of the program.
- b. Provide the name of each common outcomes within the program based on outcomes found within the *Common Outcomes*.



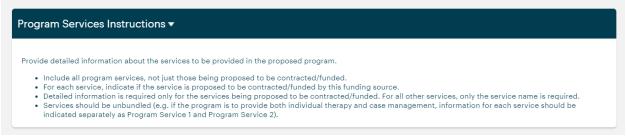
- 5. Program Performance Measures (Outcomes #1-5)
 - a. Complete all fields of the Program Outcomes table. Only one data point should be included in each %, indicator, and method of measurement included. All appropriate contributing services which lead to the outcome should be listed within the contributing services. NOT include the % symbol in the field.



- b. Utilize the Boone Impact Common Outcomes:
 https://www.booneimpact.org/?post_projects=boone-impact-group-common-outcomes when providing the Program Outcome.
- c. Program Performance Measures Narrative: Provide responses to all fields.

6. Program Services Instructions

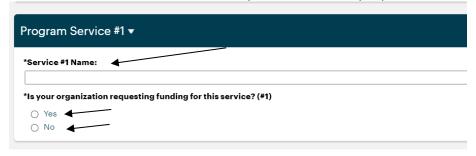
Review all the program instructions.



b. Complete the following sections for each service: Program Service and
 Description, Funding Request, Performance Measures, and Additional Funding
 Sources. There is the ability to add up to five different services in the Program
 Outcomes and Services form.

7. Program Services

a. Provide the name of each service within the program based on services found within the *Taxonomy of Services*. Indicate if funding is being requested for this service. If no funding is requested for that particular service, no additional information will be required. If funding is requested for a service, additional information will be required within the proposal.



 Utilize the Boone Impact Group Taxonomy of Services: http://www.booneimpact.org/wp-content/uploads/2021/06/Taxonomy-of-Services-Update-6.1.21.pdf to include the name of the service.

For example:

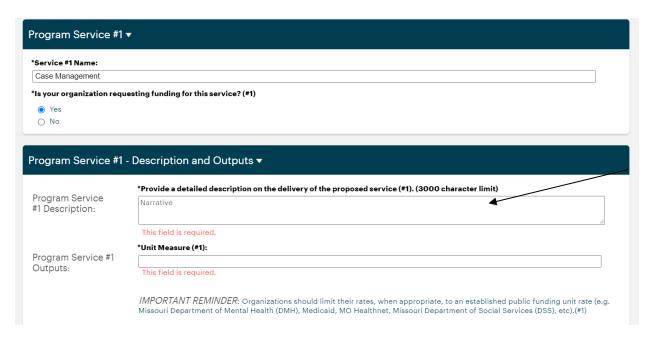
4.9 BEHAVIORAL HEALTH EVALUATION

Name of Service

Evaluation by a qualified mental health professional to determine a mental health diagnosis.

b. Name and Description:

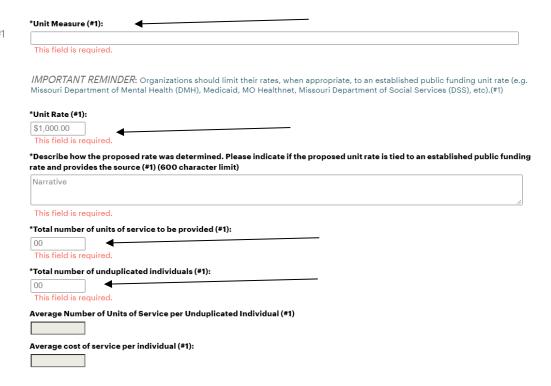
i. For program services for which funding is requested, complete the following fields.



c. Outputs:

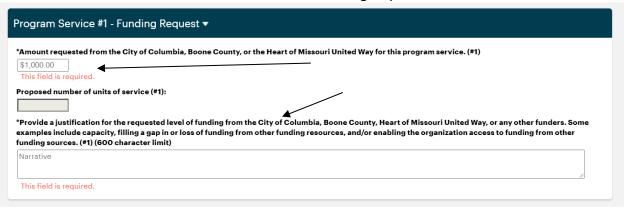
- Enter the Unit Measure (the way each service will be measured) and the Unit Rate (the amount charged for each unit measure) into the appropriate field. Provide a narrative response to the Unit Rate question.
- ii. Enter the Total Number of Units to be Provided (the total number of services that will be offered) and the Total Number of Unduplicated Individuals (the total number of individuals not duplicated that will receive this service) into the appropriate field. Averages will automatically calculate in the grayed out fields.

Program Service #1 Outputs:



d. Program Services - Funding Request

i. Include the amount requested in for the service and a justification for the requested funding. The proposed number of units field will auto calculate based on the funding request.



e. **Program Service – Additional Fund Source:** indicate all other sources of funding for this program service.

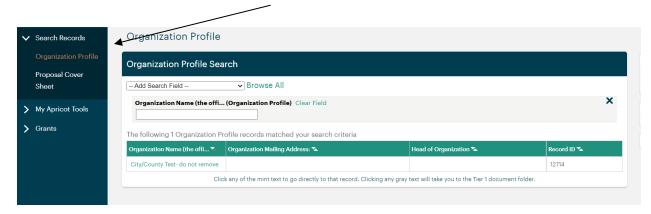


f. Complete each Program Service table with all services offered within a program.

Section 5: Submitting Proposals

Before submitting a proposal(s) it is very important to review both the **Organization Profile** and the **Proposal Cover Sheet/ Proposal Cover Sheet Document Folder** to ensure all fields are completed.

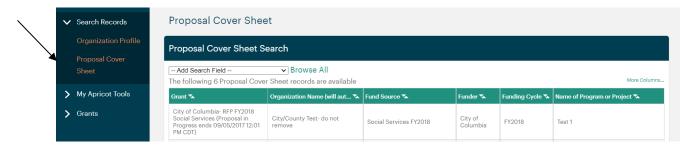
- 1. Reviewing the Organization Profile
 - a. To access the **Organization Profile**, click on the **Organization Profile** in the upper left-hand corner under **Search Records**.



b. This will navigate you to the **Organization Profile/Organization Profile Search** page. Click on the **Organization Name**.



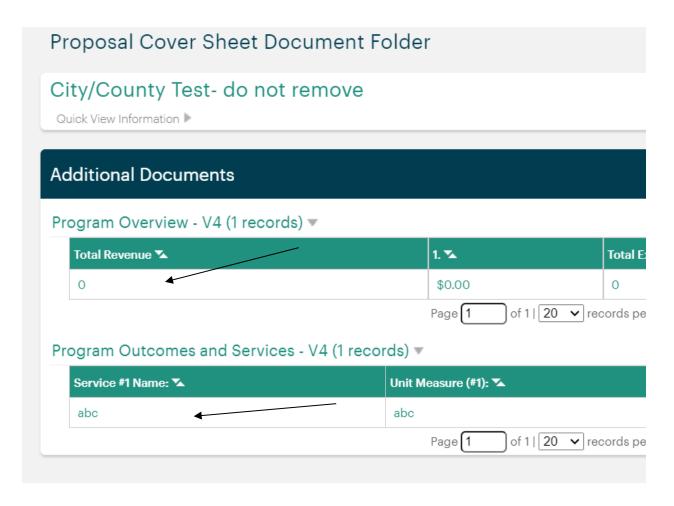
- c. This will navigate to your **Organization Profile.** Everything must be complete and up to date in the **Organization Profile** to submit a proposal.
- 2. Reviewing the Proposal Cover Sheet/Proposal Cover Sheet Document Folder
 - a. To access the **Proposal Cover Sheet**, click on the **Proposal Cover Sheet** in the upper left-hand corner under **Search Records**.



b. Click on the Proposal Cover Sheet that corresponds to this RFP. This will take you to the Proposal Cover Sheet Document Folder. Review the Additional Documents section to determine if all the fields are complete in the: Program Overview, Program Service, and Additional Program Services (if applicable).



c. Review all the items in listed in the **Additional Documents** section.



d. Click on **Edit Proposal Cover Sheet** on the right-hand side of the screen under **Folder Actions** to open the **Proposal Cover Sheet** to ensure that all fields are complete.



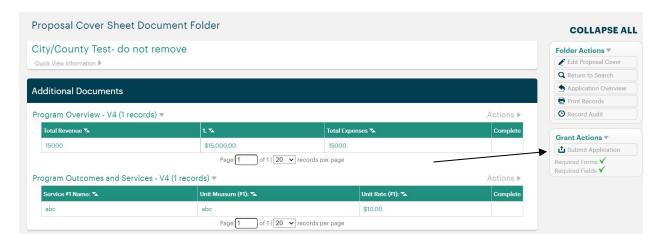
IMPORTANT REMINDER

Review all the fields in both the **Organization Profile**, the **Proposal Cover Sheet Document Folder**, and the **Proposal Cover Sheet** to ensure that **ALL** fields are complete. Due to the requirements of the funding management system, there are some sections and sub-sections that are not marked required but **MUST** be completed. Please do not utilize the green check marks in the **Record Save Checklist Box** as a guide to completeness.

3. To submit the proposal, return to the **Proposal Cover Sheet Folder** and click on the applicable **Proposal Cover Sheet** for the proposal being submitted.



This will navigate you to the **Proposal Cover Sheet Document Folder**. Click on the **Submit Application** under the **Grant Actions**.

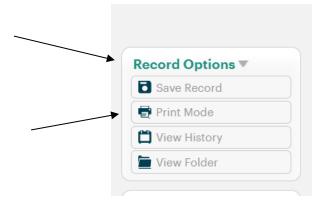


PLEASE NOTE

Your proposal cannot be edited once it has been submitted.

Section 6: Helpful Tips

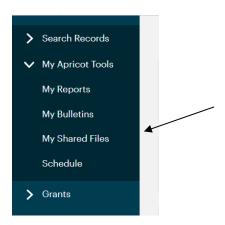
 Printing records – The ability to print is found under the Record Options box on the right-hand of the screen under Print Mode. Follow instructions to print one or more forms.



2. Submitting additional proposals – If you wish to submit more than one proposal, click on **Application Overview** to access **Available** RFPs. Scroll down to the proposal and click on the **Apply** button to start the proposal submission process again.



- 3. **My Apricot Tools** This section has downloadable PDF forms that will be helpful when applying for an RFP. To access these documents, follow the directions below:
 - a. Click on My Shared Files on the left-side of the screen under Search Records.



b. This screen will appear. Click on the triangle after Boone County Files.



- c. This will allow you access to the pdf forms and Word documents that will be helpful for this RFP.
- 4. Symbols below are common symbols utilized in *Apricot by Social Solutions*.
 - a. * = Required Field
 - b. = Open or close viewing of forms.
 - c. = Tool Tip: If the cursor hovers over this it will information about that specific request or requirement.
 - d. = This green check mark does not necessarily indicate that a form is complete.

 Due to the system requirements, some sections, and sub-sections may have information not marked as required but must be completed.
 - e. × = Indicates that a form is incomplete.
 - f. = Enables users to see section values in the **Additional Documents** section.