



# Proposal Submission Instructions

## Boone County

- ❖ Children's Services Funding
- ❖ Community Health and Medical Funding

## City of Columbia

- ❖ Social Services Funding

## Heart of Missouri United Way

- ❖ Community Impact Funding

## Table of Contents

Introduction.....	2
Section 1: Accessing the System .....	3
Section 2: Developing and Submitting Proposals.....	4
Step 1: Update Organization Profile .....	4
Step 2: Create Proposal Cover Sheet.....	7
Step 3: Create Proposal Forms.....	12
Step 4: Complete Proposal Forms.....	13
Step 5: Review Proposal.....	15
Step 6: Submit Proposal.....	19
Section 3: Helpful Tips.....	20

## Contact Information

For questions or to report technical difficulties, please contact:

<b>Boone County</b>	Boone County Community Services 573.886.4298 communityservices@boonecountymo.org <a href="http://www.showmeboone.com/communityservices">www.showmeboone.com/communityservices</a>
<b>City of Columbia</b>	Division of Human Services 573.874.7488 humanservices@como.gov <a href="http://www.como.gov">www.como.gov</a> (search: social services funding)
<b>Heart of Missouri United Way</b>	573.443.4523 <a href="http://www.uwheartmo.org">www.uwheartmo.org</a>

# Introduction

These instructions are intended to assist organizations in submitting proposals in response to City of Columbia requests for proposals (RFPs) for social services utilizing the joint City of Columbia, Boone County, and Heart of Missouri United Way web-based funding management system.

## Section 1: Accessing the System

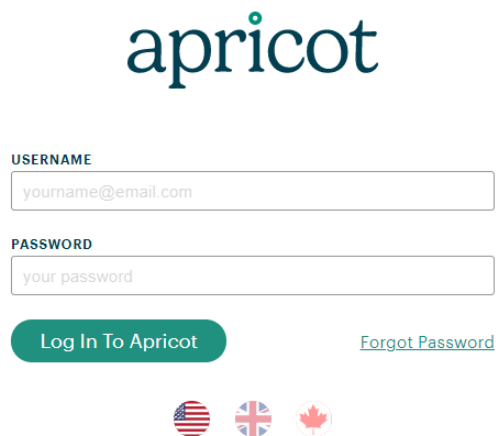
To access the system:

1. Copy and paste the following link to their internet web browser (preferably Google 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.

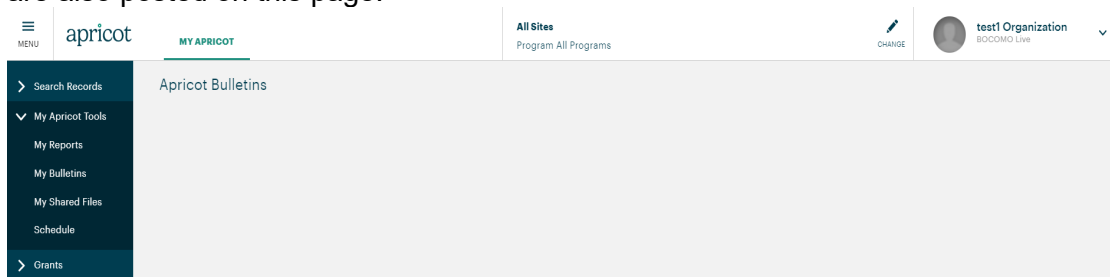


The login interface for the Apricot system. It features the 'apricot' logo at the top. Below the logo are two input fields: 'USERNAME' with a placeholder 'yourname@email.com' and 'PASSWORD' with a placeholder 'your password'. Below the password field is a green 'Log In To Apricot' button and a blue 'Forgot Password' link. At the bottom, there are three circular icons representing the United States, the United Kingdom, and Canada.

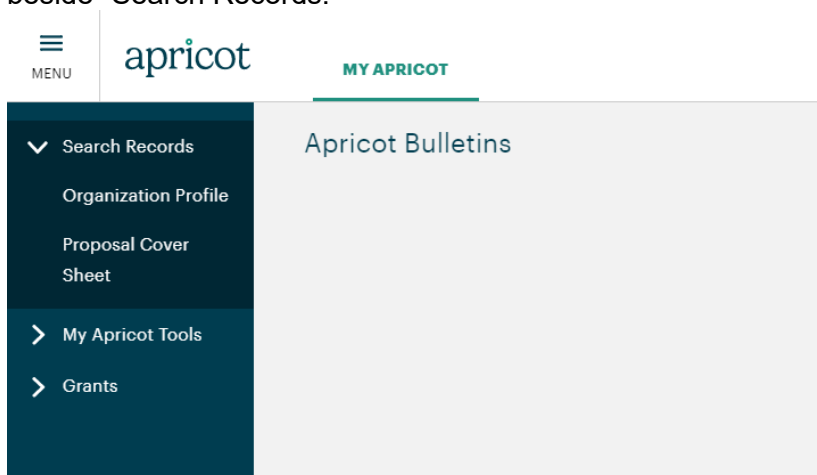
### PLEASE NOTE

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 of Columbia, and the Heart of Missouri United Way.)

- 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 are also posted on this page.



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



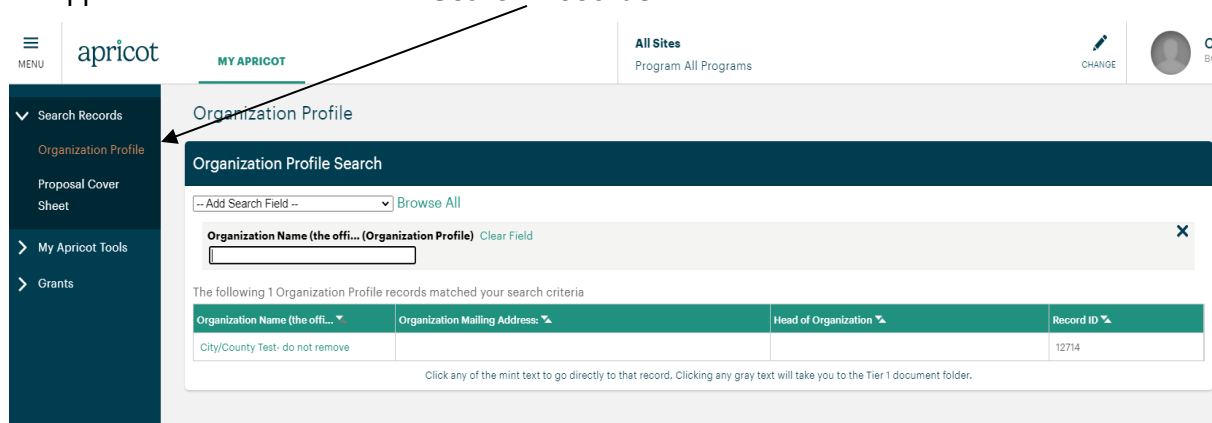
## Section 2: Developing and Submitting Proposals

This section provides step-by-step instructions to develop and submit proposals.

### Step 1: Update Organization Profile

You will first need to update your **Organization Profile**.

- To access the **Organization Profile**, click on **Organization Profile** in the navigation menu in the upper left-hand corner under **Search Records**.



- This will navigate you to the **Organization Profile Search** page in which your organization name is listed. Click on your organization's name.

Organization Profile

**Organization Profile Search**

-- Add Search Field -- [Browse All](#)

**Organization Name (the official name of the organization that would enter into a contract):** [Clear Field](#) ✕

The following 1 Organization Profile records matched your search criteria

Organization Name (the official name of the organization that would enter into a contract)	Organization Mailing Address	Head of Organization	Record ID
City/County Test- do not remove			12714

Click any of the mint text to go directly to that record. Clicking any gray text will take you to the Tier 1 document folder.

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

Organization Profile

**Organization Profile Instructions**

**New Users:**

In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

**Returning Users:**

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

**Organization User Information**

**Primary Information**

**\*Organization Name (the official name of the organization that would enter into a contract):**

City/County Test- do not remove

**DBA:**

**Federal EIN Number:**

**\*Organization Type:**

Governmental

- Update all applicable information in the **Organization Profile**, including uploaded documents.

Organization Profile

**Organization Profile Instructions**

**New Users:**

In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

**Returning Users:**

You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

**Record Options**

[Save Record](#)

[Print Mode](#)

[View History](#)

[View Folder](#)

**Assigned Programs**

City/County Social Service... Organizations

[Program Access](#)

**COLLAPSE ALL**

The **Employee Compensation** section requires records for each employee position. Click on the **New** tab when adding an employee record.

**Employees Compensation** ▾

Top Five Compensated Employees:  
Please provide titles, minimum qualifications, and salary information for the organization's top five compensated employees.  
FTE = Full Time Equivalent (i.e., Full-Time = 1.0 FTE, Half-Time = 0.5 FTE, etc.)  
FTE = number of hours worked by employee per year/2080 (e.g., 1040/2080 = .5 FTE)  
FTE should not exceed 1.0 for each employee.  
Click +New to add Employee Compensation information.

**Employees**

☒ Hide Deactivated Links [New](#)

Employees Compensation				Link Info				
	Employee Title: ▾	Qualifications: ▾	FTE: ▾	Salary: ▾	Benefits: ▾	Active: ▾	Delete	Date ▾
	John Doe	MSW	1.00	\$50,000.00	\$1,500.00	<input checked="" type="checkbox"/>		Added on 05/17/2022

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

This will open an individual record for each employee.

**Employees Compensation**

**Employees Compensation** ▾

Position or Title (Do not use name)	Qualifications (B.A., Licensed, etc.)	FTE	Salary (wages, social security, Medicare)	Benefits	Other Compensation from Organization	Salary Range From:	Salary Range To:
<b>Employee Title:</b> <input type="text"/>	<b>Qualifications:</b> <input type="text"/>	<b>FTE:</b> <input type="text" value="0.0"/>	<b>*Salary:</b> <input type="text" value="\$1,000.00"/>	<b>Benefits:</b> <input type="text" value="\$1,000.00"/>	<b>Other:</b> <input type="text" value="\$1,000.00"/>	<b>Range From:</b> <input type="text" value="\$1,000.00"/>	<b>Range To:</b> <input type="text" value="\$1,000.00"/>

To edit existing employee record, click any of the fields in the record quick view information. This will open the record for editing.

**Employees Compensation** ▾

Top Five Compensated Employees:  
Please provide titles, minimum qualifications, and salary information for the organization's top five compensated employees.  
FTE = Full Time Equivalent (i.e., Full-Time = 1.0 FTE, Half-Time = 0.5 FTE, etc.)  
FTE = number of hours worked by employee per year/2080 (e.g., 1040/2080 = .5 FTE)  
FTE should not exceed 1.0 for each employee.  
Click +New to add Employee Compensation information.

**Employees**

☒ Hide Deactivated Links [New](#)

Employees Compensation				Link Info				
	Employee Title: ▾	Qualifications: ▾	FTE: ▾	Salary: ▾	Benefits: ▾	Active: ▾	Delete	Date ▾
	John Doe	MSW	1.00	\$50,000.00	\$1,500.00	<input checked="" type="checkbox"/>		Added on 05/17/2022

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Once the information is added or updated make sure to click on the **Save Linked Record** tab in the **Record Options** box.

**Employees Compensation**

**Employees Compensation** ▾

Position or Title (Do not use name)	Qualifications (B.A., Licensed, etc.)	FTE	Salary (wages, social security, Medicare)	Benefits	Other Compensation from Organization	Salary Range From:	Salary Range To:
<b>Employee Title:</b> John Doe	<b>Qualifications:</b> MSW	<b>FTE:</b> 1.00	<b>*Salary:</b> \$50,000.00	<b>Benefits:</b> \$1,500.00	<b>Other:</b> \$0.00	<b>Range From:</b> \$45,000.00	<b>Range To:</b> \$65,000.00

**COLLAPSE ALL**

**Record Options** ▾

- [Save Linked Record](#)
- [View Full Record](#)
- [Cancel](#)

**Assigned Programs** ▾

- [Organizations](#)
- [Program Access](#)

As positions change, rather than adding new records, it is easiest to simply edit an existing record.

If a board member or employee leaves and that position will not be filled, unclick the **Active** check mark. There is no delete button.

Employees Compensation ▾

Top Five Compensated Employees:

Please provide titles, minimum qualifications, and salary information for the organization's top five compensated employees.

FTE = Full Time Equivalent (i.e., Full-Time = 1.0 FTE, Half-Time = 0.5 FTE, etc.)

FTE = number of hours worked by employee per year/2080 (e.g., 1040/2080 = .5 FTE)

FTE should not exceed 1.0 for each employee.

Click +New to add Employee Compensation information.

Employees

Hide Deactivated Links

+ New

Employees Compensation					Link Info			
	Employee Title: ▾	Qualifications: ▾	FTE: ▾	Salary: ▾	Benefits: ▾	Active: ▾	Delete	Date ▾
	John Doe	MSW	1.00	\$50,000.00	\$1,500.00	<input checked="" type="checkbox"/>		Added on 05/17/2022

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

- To save the information you have entered in your **Organization Profile**, click **Save Record** under **Record Options** as you work on completing these fields and when it is complete.

**Organization Profile**

**Organization Profile Instructions** ▼

**New Users:**  
In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

**Returning Users:**  
You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

**Record Options** ▼

[Save Record](#)

[Print Mode](#)

[View History](#)

[View Folder](#)

**Assigned Programs** ▼

City/County Social Service... Organizations

[Program Access](#)

**COLLAPSE ALL**

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.

- ❖ If you would like to continue to work on the **Organization Profile**, click on **Continue**.

**Record Saved**

[Continue](#) [View Folder](#) [Go To Search](#)

The **Organization Profile** will remain open.

**Organization Profile**

**Organization Profile Instructions** ▼

**New Users:**  
In order to create a Username and Password, complete the Organization User Information and Primary Information sub-sections and click Save Record on the right hand side of the screen. Be sure to save your Username and Password in a secure location for future use. Once you click Save Record you will be prompted to log in. This will allow you to access the system and complete the Organization Profile.

**Returning Users:**  
You must complete and keep up-to-date ALL applicable fields in your Organization Profile. Proposals and Reports will be considered unresponsive if your Organization Profile is not complete and up-to-date.

**Record Options** ▼

[Save Record](#)

[Print Mode](#)

[View History](#)

[View Folder](#)

**Assigned Programs** ▼

City/County Social Service... Organizations

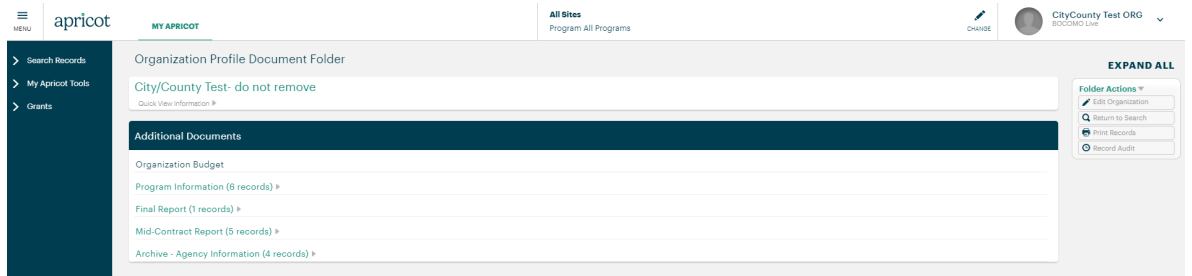
[Program Access](#)

**COLLAPSE ALL**

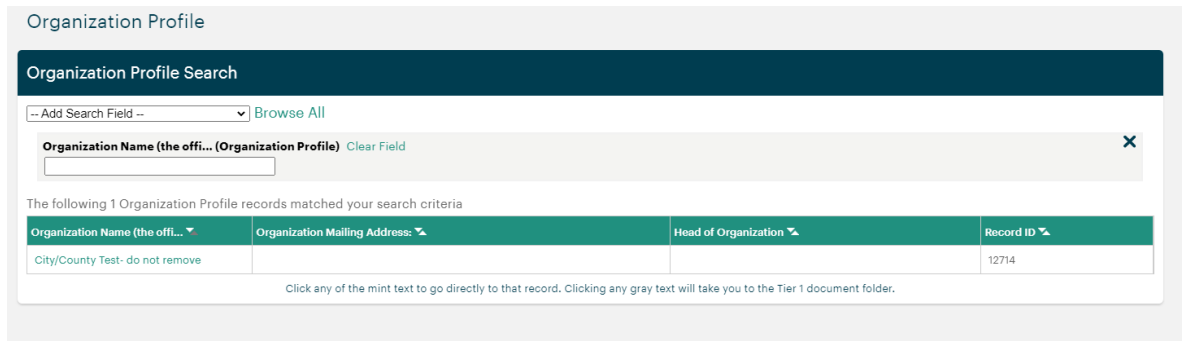
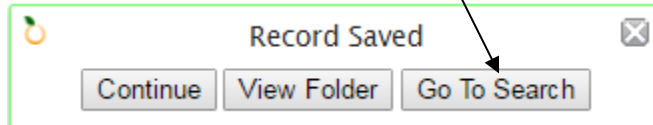
- ❖ If **View Folder** is clicked, you will be navigated to the **Organization Profile Document Folder**.

**Record Saved**

[Continue](#) [View Folder](#) [Go To Search](#)



- ❖ If you click **Go To Search**, you will be navigated back to the **Organization Profile Search** that where a link to your **Organization Profile** will be listed.



### PLEASE NOTE

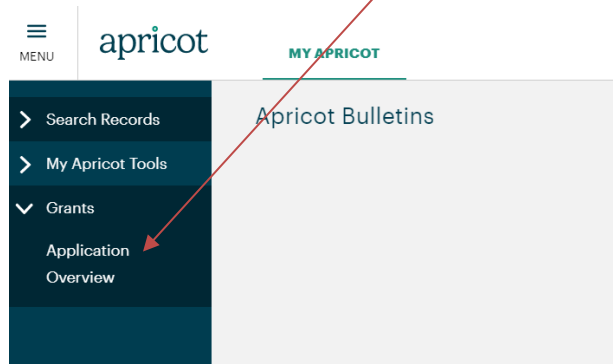
The **Organization Profile** must be complete and up to date when submitting a proposal. Proposals will be considered unresponsive if any applicable fields are incomplete.

There are some fields that are not required form fields but must be completed. Please do not utilize the green check marks, in the **Record Save Checklist** as a guide for completeness.

## Step 2: Create Proposal Cover Sheet

The next step is to create a **Proposal Cover Sheet**.

1. In the blue navigation menu on the left side of the screen, click **Grants** and then **Application Overview**.



- This will navigate you to the **Application Overview** page, which will list any **Available** (open) RFPs and RFPs for which you have submitted proposals.

**Make sure you are applying for the correct funding opportunity listed on the Application Overview page.** (Images in this instruction guide do not pertain to a particular funding opportunity.)

- Click **Open – Click Here to Apply** for the applicable RFP to open a new **Proposal Cover Sheet**.

- Under the **Proposal Request Information** section complete the **Fund Source** (make sure that this matches the RFP for which you are applying, as selected on the **Application Overview** page), **Name of Program or Project**, and the **Amount of the Request**. The **Organization Name**, **Funder**, and **Funding Cycle** will all auto-populate.



## PLEASE NOTE

Be sure the fund source you select matches the RFP for which you are applying, as selected on the **Application Overview** page.

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

6. 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.

7. 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.

- ❖ If you would like to continue to work on the **Cover Sheet**, click on **Continue**.

The **Proposal Cover Sheet** will remain open.

**Proposal Cover Sheet**

**Proposal Request Information**

Grant  
City of Columbia- RFP FY2022 Social Services (Proposal in Progress)

\*Organization Name (will auto-populate)

City/County Test- do not remove

Fund Source  
Social Services FY2022

Funder  
City of Columbia

\*Funding Cycle

FY2022

\*Name of Program or Project

FY2022 test 1

\*City Social Services- Issue Area

Basic Needs

\*City Social Services- Program Service Period

☒ Year Round  
☐ School Year  
☐ Summer

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

**Record Saved**

Continue View Folder Go To Search

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

**Proposal Cover Sheet Search**

-- Add Search Field -- [Browse All](#)

The following 6 Proposal Cover Sheet records are available [More Columns...](#)

Grant	Organization Name (will aut...)	Fund Source	Funder	Funding Cycle	Name of Program or Project
City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2018	City of Columbia	FY2018	Test 1
City of Columbia- RFP FY2019 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2019	City of Columbia	FY2019	Test 1

- ❖ If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder**.

**Record Saved**

Continue View Folder Go To Search

From the **Proposal Cover Sheet Document Folder**, you can begin completing the proposal forms, per Step 3.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information

Additional Documents

Program Overview - V4.1 (1 records) ▾

Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit) %	Residence Total %	Complete
	0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records) ▾

Total Revenue %	%	Total Expenses %	Complete
0	\$0.00	0	

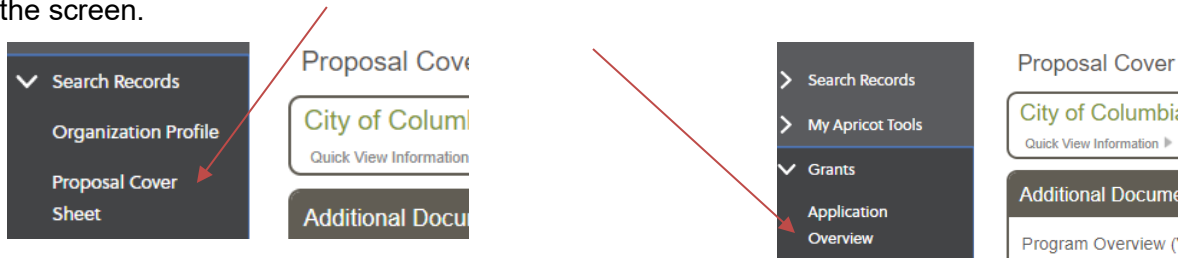
Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▾

Service #1 Name: %	Unit Measure (#1): %	Unit Rate (#1): %	Complete
Case Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

8. You can navigate back to any **Proposal Cover Sheets** you have created by clicking on either the **Proposal Cover Sheet** or **Application Overview** the white navigation menu on the left side of the screen.



Clicking on these links will respectively direct you to the **Proposal Cover Sheet Search** page or the **Application Overview** page.

- ❖ To open the **Proposal Cover Sheet** from the **Proposal Cover Sheet Search** page, click on any of the form quick fields for the applicable cover sheet.

Proposal Cover Sheet Search

-- Add Search Field -- Browse All

The following 6 Proposal Cover Sheet records are available

Grant ▾	Organization Name (will aut... ▾	Fund Source ▾	Funder ▾	Funding Cycle ▾	Name of Program or Project ▾
City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2018	City of Columbia	FY2018	Test 1
City of Columbia- RFP FY2019 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2019	City of Columbia	FY2019	Test 1

- ❖ To access the **Proposal Cover Sheet** from the **Application Overview** page, click on any of the form quick fields for the applicable cover sheet.

apricot

MY APRICOT

All Sites Program All Programs

CHARGE

CityCounty Test ORG

COLLAPSE ALL

Application Overview

Current Profile City/County Test- do not remove

Application Summary

- + 2 Grants (24 Incomplete, 31 total)
- + 7 Applications

Show Access Details

Children's Services Fund - Identified Youth Needs ▾

Description This RFP will open on 7/13/2021.

Enrollment End Date 08/23/2021 12:00 PM CDT

Status Open - Click Here to Apply

Proposal Cover Sheet Applications

Access (Organization Name (will auto-populate))	Fund Source	Funder	Funding Cycle	Name of Program or Project	Record Lock
View City/County Test- do not remove	Children's Services Fund - Identified Youth Needs	Boone County	RFP 28-2346/2021	Enter Name Here	af

This will navigate you to the **Proposal Cover Sheet Document Folder**. To open the **Proposal Cover Sheet**, click on **Edit Proposal Cover** in the navigation menu on the right-hand side of the screen under **Folder Actions**.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information

**Additional Documents**

Program Overview - V4.1 (1 records) ▾

a. Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit) %	Residence Total %	Complete
	0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records) ▾

Total Revenue %	1 %	Total Expenses %	Complete
0	\$0.00	0	

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▾

Service #1 Name: %	Unit Measure (#): %	Unit Rate (#1): %	Complete
Case Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

**Folder Actions** ▾

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record Audit

### Step 3: Create Proposal Forms

#### PLEASE NOTE

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

- Once you have completed the **Proposal Cover Sheet**, you can create the proposal forms.

For each proposal, you will need to create the following forms:

- ❖ One **Program Overview** form
- ❖ One **Program Personnel and Services**
- ❖ One **Program Outcomes and Services** form

- To locate the proposal forms, navigate to the **Proposal Cover Sheet Document Folder**, per Section 2.2.8. The **Proposal Cover Sheet Document Folder** contains all the forms for each proposal, under **Additional Documents**.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information

**Additional Documents**

Program Overview - V4.1 (1 records) ▾

a. Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit) %	Residence Total %	Complete
	0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records) ▾

Total Revenue %	1 %	Total Expenses %	Complete
0	\$0.00	0	

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▾

Service #1 Name: %	Unit Measure (#): %	Unit Rate (#1): %	Complete
Case Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

- To create a proposal 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 proposal form.

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

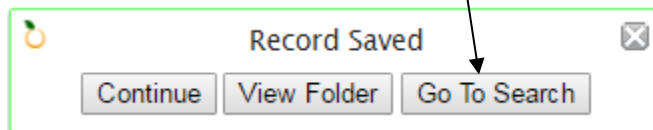
After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ If **View Folder** is clicked, you will be navigated back to the **Proposal Cover Sheet Document Folder** where the proposal forms are located (under **Additional Documents**).

If you would like to continue to work on the proposal form, click on **Continue**.

The proposal form will remain open.

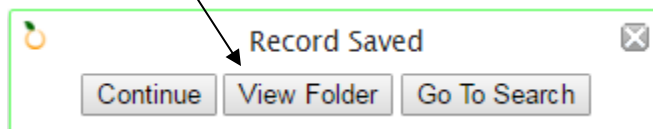
- ❖ If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.



For example, the **Proposal Cover Sheet Search** for this organization indicates the organization has three **Cover Sheets**. Click any of the form quick view fields to access the applicable cover sheet.

Proposal Cover Sheet Search					
-- Add Search Field -- <a href="#">Browse All</a>					
The following 6 Proposal Cover Sheet records are available <a href="#">More Columns...</a>					
Grant	Organization Name (will aut...	Fund Source	Funder	Funding Cycle	Name of Program or Project
City of Columbia- RFP FY2018 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2018	City of Columbia	FY2018	Test 1
City of Columbia- RFP FY2019 Social Services (Proposal in Progress ends 09/05/2017 12:01 PM CDT)	City/County Test- do not remove	Social Services FY2019	City of Columbia	FY2019	Test 1

- ❖ If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder**.



Proposal Cover Sheet Document Folder			
City/County Test- do not remove			
<a href="#">Quick View Information</a>			
<b>Additional Documents</b>			
Program Overview - V4.1 (1 records) ▾			
a. Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit) %			Residence Total %
			0
Page 1 of 1   20 records per page			
Program Personnel and Budget - V4.1 (1 records) ▾			
Total Revenue %	%	Total Expenses %	Complete
0	\$0.00	0	
Page 1 of 1   20 records per page			
Program Outcomes and Services - V4 (1 records) ▾			
Service #1 Name: %	Unit Measure (M): %	Unit Rate (R): %	Complete
Case Management	15 minutes	\$6.00	
Page 1 of 1   20 records per page			

- Once created, proposal forms can be accessed in the **Proposal Cover Sheet Document Folder** under **Additional Documents**. To open and edit proposal forms at any time prior to submitting the proposal, click on any of the form quick view fields.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information ►

**Additional Documents**

Program Overview - V4.1 (1 records) ▼

Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m. - 5 p.m.), and any other logistical information for the proposed program. (500 character limit) %		Residence Total %	Complete
		0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records) ▼

Total Revenue %	Total Expenses %	Complete
0	0	

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▼

Service #1 Name: %	Unit Measure (#): %	Unit Rate (#): %	Complete
Case Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

**Folder Actions ▼**

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record Audit

**Grant Actions ▼**

- Submit Application
- Required Forms ✓
- Required Fields ✓

### PLEASE NOTE

- ❖ If you inadvertently create more than one of each proposal form, please contact the applicable funder.
- ❖ For each additional proposal to be submitted in response to a RFP, you will need to re-start the process at **Step 2: Create Proposal Cover Sheet**.

## Step 4: Complete Proposal Forms

As you complete the proposal forms, please note the following:

- ❖ Be sure to thoroughly read the instructions for each form and section.
- ❖ The time period of the proposed year is indicated in each RFP.
- ❖ The total amount proposed should be the same in the Program Overview form, Program Outcomes and Services form, and Proposal Cover Sheet.
- ❖ Remember to save frequently so information is not lost.

### Program Overview Form

As you complete the Program Overview form, please note the following:

#### Program Consumers

- ❖ The total number of unduplicated individuals to be served is for the entire proposed program.
- ❖ Program Consumer Demographics
  - The totals in each sub-section should match one another and should match the total number of unduplicated individuals to be served.
  - Consumer Demographics by Residence
    - The number of Boone County residents to be served should include all City of Columbia residents to be served (all City of Columbia residents are also resident of Boone County).
    - The Residence Total is a calculation which totals the county counts.

Residence ▼	
Boone County (includes City of Columbia residents)	City of Columbia
<input type="text" value="0"/>	<input type="text" value="0"/>
Cooper County	
<input type="text" value="0"/>	
Howard County	
<input type="text" value="0"/>	
Other Counties	
<input type="text" value="0"/>	
Residence Total	
<input type="text" value="0"/>	

### Program Budget

- ❖ The Proposed period is indicated in each RFP.
- ❖ Amounts should be for entire program.
- ❖ Be sure to include a narrative for each item.
- ❖ Be sure to include the total proposed amount in the applicable revenue source. This amount should match the total amount proposed indicated in the Program Outcomes and Services form.

### Program Outcomes and Services Form

As you complete the Program Outcomes and Services form, please note the following:

#### Program Outcomes and Performance Measures

- ❖ Complete the logic model for the entire program.
- ❖ Outcomes must be selected from the Boone Impact Group Common Outcomes included with each RFP.
- ❖ Up to three Indicators can be included for each Outcome.
  - Only one data point should be included in each Indicator %, Indicator, and Method of Measurement field.
  - Only list a number in the Indicator % fields. Do NOT include the % symbol in these fields.
- ❖ All program services indicated in the Program Services section should be indicated as contributing to at least one Outcome.
  - Program services should be included regardless of whether or not they are being proposed for funding.
- ❖ All program services which contribute to an Outcome should be listed in the Contributing Services.
  - This may mean services are indicated across multiple outcomes.

#### Program Services

- ❖ Program services must be selected from the Boone Impact Group Taxonomy of Services included with each RFP.
- ❖ Enter program services for which funding is requested first.
- ❖ You only need to enter detailed information for services for which funding is requested.
- ❖ As applicable by funder, the program services should match the program services approved in the Letter of Intent.

## Step 5: Review Proposal



Before submitting a proposal, it is critical that you review the **Organization Profile, Proposal Cover Sheet, and Proposal forms** to ensure all forms were created and all fields are completed.

1. Review the **Organization Profile** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required form fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

The screenshot shows the Apricot system interface for the 'Organization Profile' form. The left sidebar contains a navigation menu with 'Search Records', 'My Apricot Tools', and 'Grants'. The main content area is divided into sections: 'Returning Users', 'Organization User Information', and 'Primary Information'. The 'Primary Information' section contains fields for 'Organization Name', 'DBA', and 'Federal EIN Number'. On the right side, there is a 'Record Options' panel with links for 'Save Record', 'Print Mode', 'View History', and 'View Folder'. Below this is an 'Assigned Programs' panel. At the bottom right is the 'Record Save Checklist' panel, which shows 'Required Field Checks' with a red 'X' and 'Field Validation Checks' with a green checkmark. An arrow points from the text above to the red 'X' in the 'Required Field Checks' section.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

This screenshot is similar to the previous one, but it shows the 'Record Save Checklist' panel with 'Required Field Checks' marked with a green checkmark, indicating that the minimum required system fields have been completed. An arrow points from the text above to the green checkmark.

However, most of the fields in the **Organization Profile** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Organization Profile**.

2. Review the **Proposal Cover Sheet** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required from fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

If a “✓” is displayed, the minimum required system fields in the form have been completed.

However, most of the fields in the **Proposal Cover Sheet** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Cover Sheet**.

- Review the **Proposal Cover Sheet Document Folder** to be sure all required proposal forms were created.

The presence of the required proposal forms is indicated in the white navigation menu on the right side of the screen under **Grant Actions**.

If an “X” is displayed, one or more of the required proposal forms is missing.

If a “✓” is displayed, the required proposal forms are present.

Proposal Cover Sheet Document Folder

City/County Test- do not remove

Quick View Information ►

**Additional Documents**

Program Overview - V4.1 (1 records) ▼ Actions ►

a. Provide details on the location, day/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit) %		Residence Total %	Complete
		0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records) ▼ Actions ►

Total Revenue %	%	Total Expenses %	Complete
0	\$0.00	0	

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records) ▼ Actions ►

Service #1 Name: %	Unit Measure (#1): %	Unit Rate (#1): %	Complete
Care Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

**COLLAPSE ALL**

**Folder Actions ▼**

- ✎ Edit Proposal Cover
- 🔍 Return to Search
- 📄 Application Overview
- 🖨 Print Records
- 🔍 Record Audit

**Grant Actions ▼**

- 📄 Submit Application
- Required Forms ✓
- Required Fields ✓

#### 4. Review the **Proposal Forms** to be sure all applicable fields are complete.

Required form fields that are incomplete are indicated in the white navigation menu on the right side of the screen under **Record Save Checklist**.

If an “X” is displayed, the required form fields are incomplete. The incomplete required from fields are listed under **Required Field Checks**. You can click on the link to each field to navigate to the incomplete field.

apricot MY APRICOT All Sites Program All Programs CHANGE CityCounty Test ORG BOOMO Live

Search Records My Apricot Tools Grants

Program Overview - V4

City/County Test- do not remove

Quick View Information ►

**Program Proposal Form Information: ▼**

The purpose of the Program Overview form is to provide detailed information regarding the program and proposed service(s).

**Guidelines:**

- Information should be based on the proposed contract/agreement period.
- Information provided should be for the entire program, not just the portion proposed to be contracted/funded by the Boone County, City of Columbia, and/or the Heart of Missouri United Way.
- Each narrative response should be clear and succinct.
- Information provided in the Program Overview form must correspond with the information provided in the Program Outcomes and Services form.
- All sources of information should be properly cited using the American Psychological Association (APA) Style of author-date method of in-text citation. All sources that are cited must appear in the reference list at the end of this form.

**Resources:**

- Boone Indicators Dashboard (<http://booneindicators.org/>)
- For detailed information regarding the APA Style, please visit the APA Style web site: <http://www.apastyle.org/>

\* Indicates Required Field

**Record Lock**  
Unlocked

**COLLAPSE ALL**

**Record Options ▼**

- 📄 Save Record
- 🖨 Print Mode
- 📄 View History
- 🔍 View Folder

**Assigned Programs ▼**

- 🔒 Organizations
- 🔒 Program Access

**Record Save Checklist ▼**

Required Field Checks X

- % Will consumers be charged...
- % Is the proposed program...
- % Are there best practices...
- % Is there evidence to su...
- %
- %
- % Describe any community...
- % State the goal(s) of th...
- % Provide a detailed desc...
- % Provide details on the ...

If a “✓” is displayed, the minimum required system fields in the form have been completed.

apricot MY APRICOT All Sites Program All Programs CHANGE CityCounty Test ORG BOOMO Live

Search Records My Apricot Tools Grants

Program Overview - V4

City/County Test- do not remove

Quick View Information ►

**Program Proposal Form Information: ▼**

The purpose of the Program Overview form is to provide detailed information regarding the program and proposed service(s).

**Guidelines:**

- Information should be based on the proposed contract/agreement period.
- Information provided should be for the entire program, not just the portion proposed to be contracted/funded by the Boone County, City of Columbia, and/or the Heart of Missouri United Way.
- Each narrative response should be clear and succinct.
- Information provided in the Program Overview form must correspond with the information provided in the Program Outcomes and Services form.
- All sources of information should be properly cited using the American Psychological Association (APA) Style of author-date method of in-text citation. All sources that are cited must appear in the reference list at the end of this form.

**Resources:**

- Boone Indicators Dashboard (<http://booneindicators.org/>)
- For detailed information regarding the APA Style, please visit the APA Style web site: <http://www.apastyle.org/>

**COLLAPSE ALL**

**Record Options ▼**

- 📄 Save Record
- 🖨 Print Mode
- 📄 View History
- 🔍 View Folder

**Assigned Programs ▼**

- 🔒 Organizations
- 🔒 Program Access

**Record Save Checklist ▼**

Required Field Checks ✓

Field Validation Checks ✓

However, most of the fields in the **Proposal Forms** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Forms**.

## Step 6: Submit Proposal

Once you have reviewed the proposal, you will need to submit it.

1. Return to the **Proposal Cover Sheet Folder** and click on the applicable **Proposal Cover Sheet** for the proposal being submitted.

**Proposal Cover Sheet**

**Proposal Cover Sheet Search**

-- Add Search Field -- [Browse All](#)

The following 6 Proposal Cover Sheet records are available [More Columns...](#)

Grant	Organization Name (will auto...	Fund Source	Funder	Funding Cycle	Name of Program or Project
Children's Services Fund - Identified Youth Needs (Application in Process ends 08/23/2021 12:00 PM CDT)	City/County Test- do not remove	Children's Services Fund - Identified Youth Needs	Boone County	RFP 29-23AUG21	Enter Name Here
Children's Services Fund - POS	City/County Test- do not	Children's Services Fund - POS	Boone	RFP #30-	

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

**Proposal Cover Sheet Document Folder**

City/County Test- do not remove

[Quick View Information](#)

**Additional Documents**

Program Overview - V4.1 (1 records)

a. Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit)	Residence Total	Complete
	0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records)

Total Revenue	T	Total Expenses	Complete
0	\$0.00	0	

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records)

Service #1 Name	Unit Measure (#1)	Unit Rate (#1)	Complete
Case Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

**COLLAPSE ALL**

**Folder Actions**

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record Audit

**Grant Actions**

- Submit Application
- Required Forms ☒
- Required Fields ☒

2. To submit the proposal, click **Submit Proposal** under the **Grant Actions**.

**Proposal Cover Sheet Document Folder**

City/County Test- do not remove

[Quick View Information](#)

**Additional Documents**

Program Overview - V4.1 (1 records)

a. Provide details on the location, days/hours of operation (e.g. Monday-Friday, 8 a.m.- 5 p.m.), and any other logistical information for the proposed program. (600 character limit)	Residence Total	Complete
	0	

Page 1 of 1 | 20 records per page

Program Personnel and Budget - V4.1 (1 records)

Total Revenue	T	Total Expenses	Complete
0	\$0.00	0	

Page 1 of 1 | 20 records per page

Program Outcomes and Services - V4 (1 records)

Service #1 Name	Unit Measure (#1)	Unit Rate (#1)	Complete
Case Management	15 minutes	\$6.00	

Page 1 of 1 | 20 records per page

**COLLAPSE ALL**

**Folder Actions**

- Edit Proposal Cover
- Return to Search
- Application Overview
- Print Records
- Record Audit

**Grant Actions**

- Submit Application
- Required Forms ☒
- Required Fields ☒

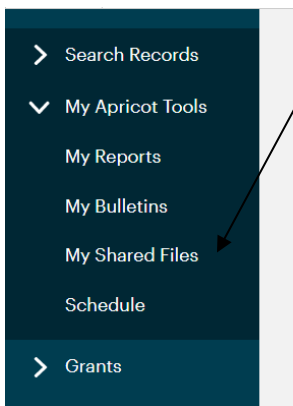
### PLEASE NOTE

- ❖ Once submitted, the proposal forms are locked and can no longer be edited. If you inadvertently submit a proposal prior to the submission deadline, contact the applicable funder to re-open the proposal forms.
- ❖ You must submit each proposal individually following the actions outlined in **Step 5:**

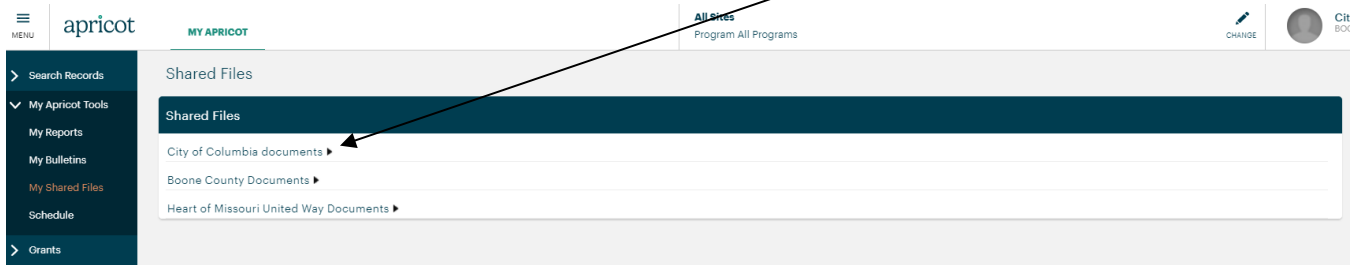
## Section 3: Helpful Tips

### ❖ My Shared Files

Supporting RFP documents are located in the My Shared Files page. To access these documents, click **My Shared Files** in the navigation menu on the left-side of the screen.





This will navigate you to the **My Shared Files page**. Click on the triangle next to the funder to access the documents.



### ❖ Symbols

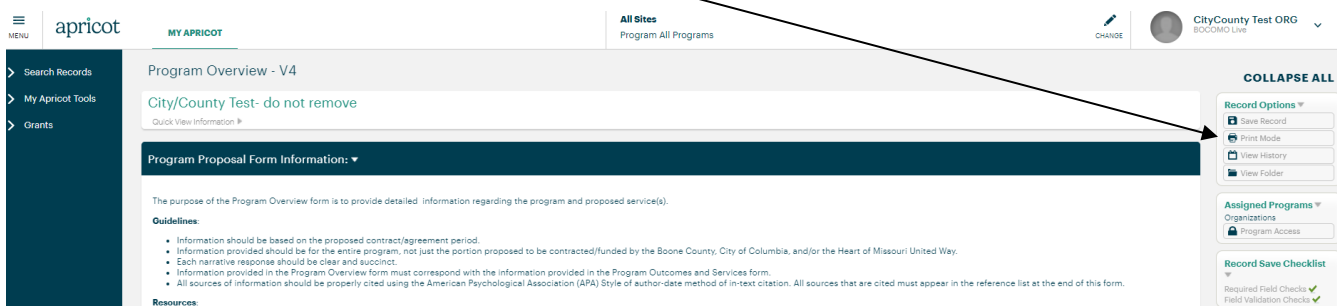
The following are symbols utilized in the *Apricot* funding management system.

*	Required Field
▼	Open or close viewing of forms.
?	Tool Tip: If the cursor hovers over this it will information about that specific request or requirement.
✓	Indicates required system fields have been completed. ( <b>Please Note:</b> A green check mark does not necessarily indicate that a form is complete.)
✗	Indicates that the required system fields are incomplete.

	Enables users to see section values in the <b>Additional Documents</b> section.
	Indicates that the field will be auto-populated. The user doesn't have the ability to enter any information.

## ❖ Printing Records

Forms can be printed using the **Print Mode** feature located in the **Record Options** menu on the right side of the screen.



The screenshot displays the Apricot system interface. On the right side, a sidebar menu is visible under the heading "COLLAPSE ALL". This menu includes a "Record Options" section with a dropdown arrow. Within this section, the "Print Mode" option is highlighted. An arrow points from the text "Print Mode" in the preceding paragraph to this specific option in the interface. Other options visible in the sidebar include "Save Record", "View History", and "View Folder". Below the "Record Options" section, there are sections for "Assigned Programs" and "Record Save Checklist".