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

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
City of Columbia	Division of Human Services 573.874.7488 humanservices@como.gov www.como.gov (search: social services funding)
Heart of Missouri United Way	573.443.4523 www.uwheartmo.org

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:

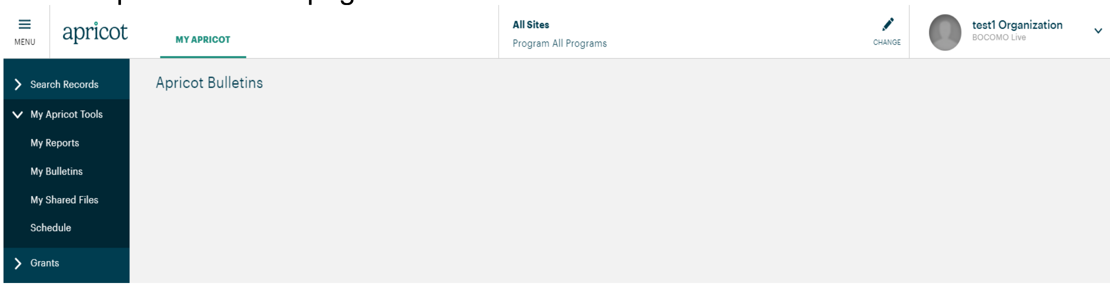
1. Copy and paste the following link to their internet web browser (preferably Google Chrome): https://ctk.apricot.info/auth

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

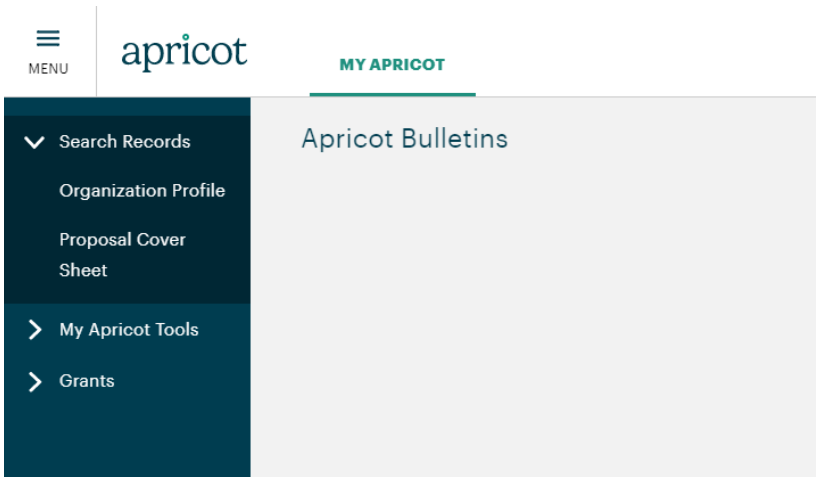
2. Enter Username and Password.

> **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.)

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 are also posted on this page.



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



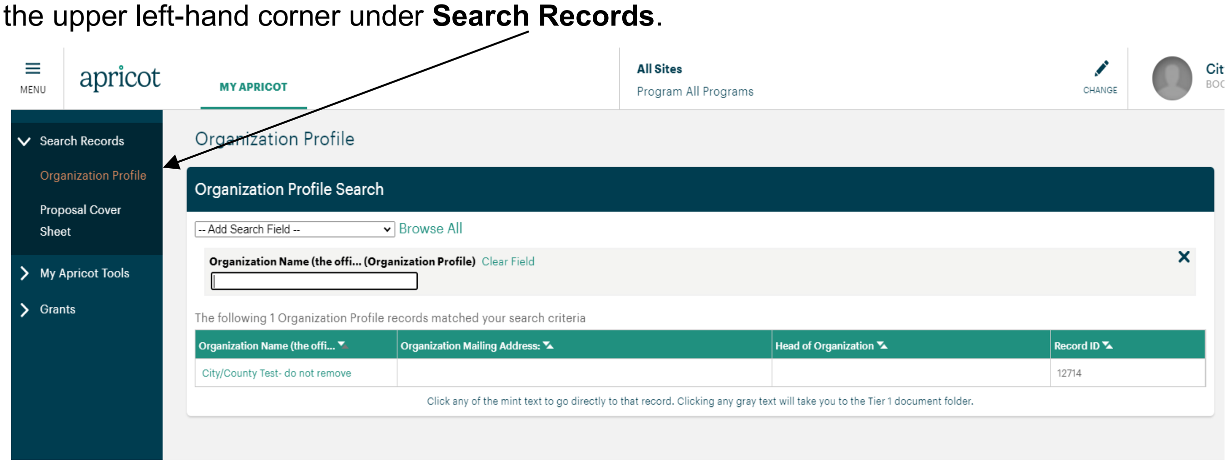
Section 2: Developing and Submitting Proposals

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

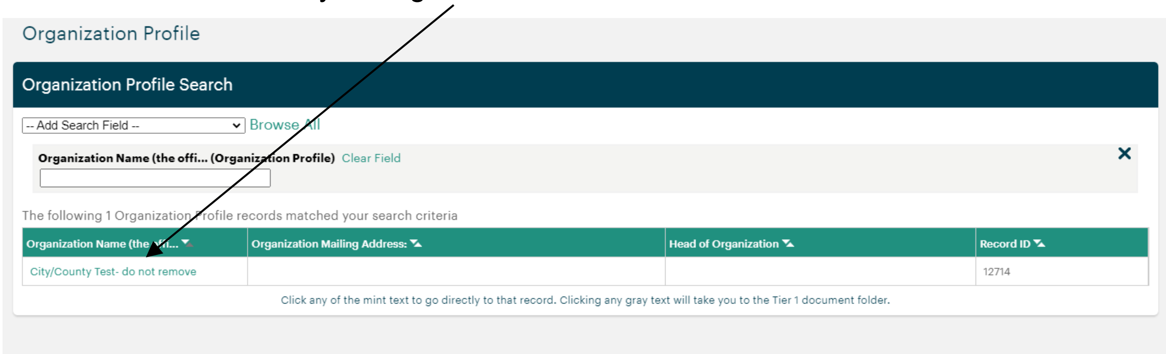
Step 1: Update Organization Profile

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

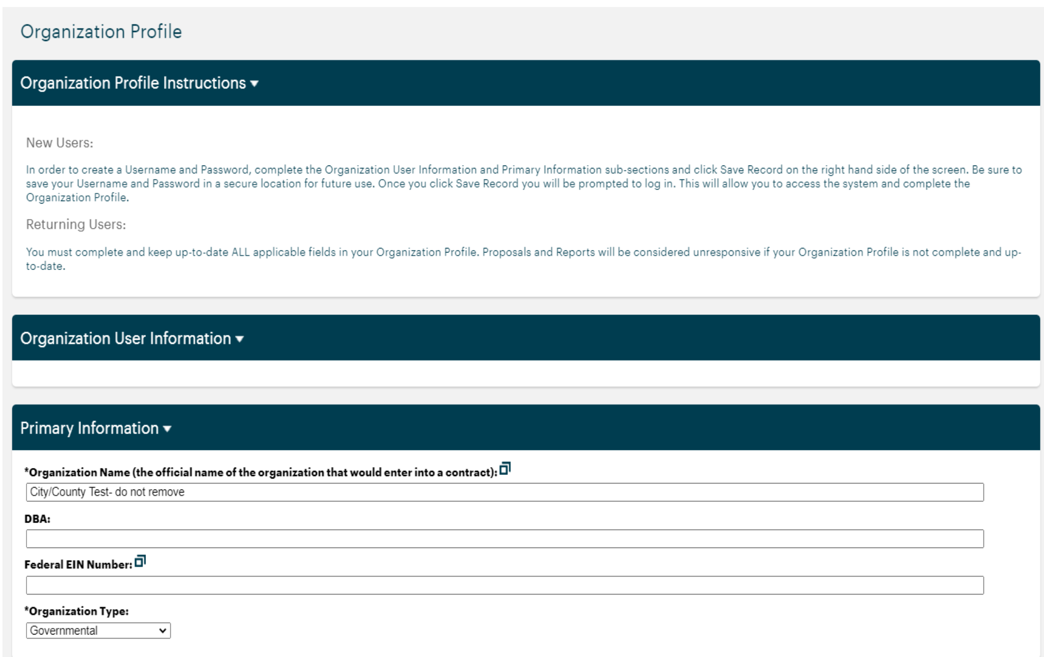
1. To access the **Organization Profile**, click on **Organization Profile** in the navigation menu in the upper left-hand corner under **Search Records**.



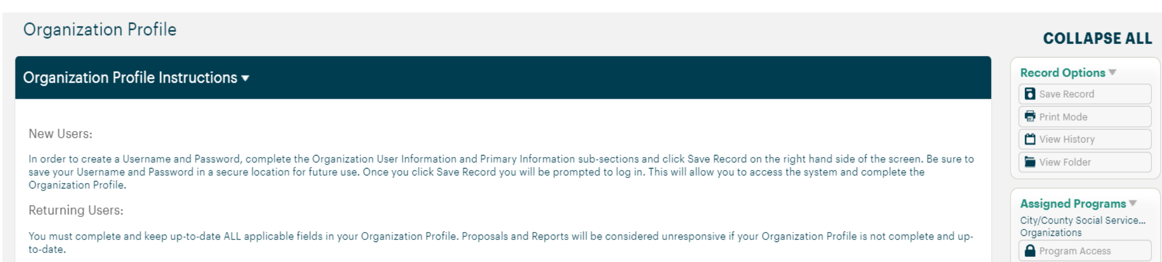
2. This will navigate you to the **Organization Profile Search page** in which your organization name is listed. Click on your organization's name.



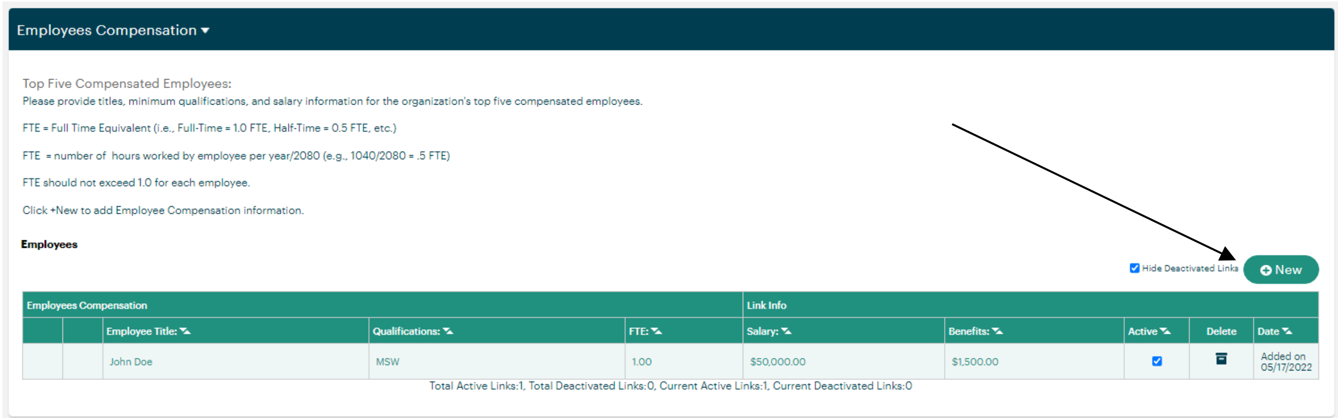
3. This will navigate you to your **Organization Profile.**



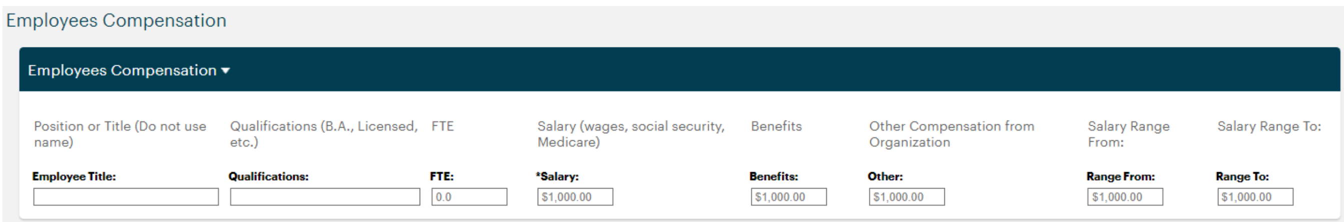
4. Update all applicable information in the **Organization Profile**, including uploaded documents.



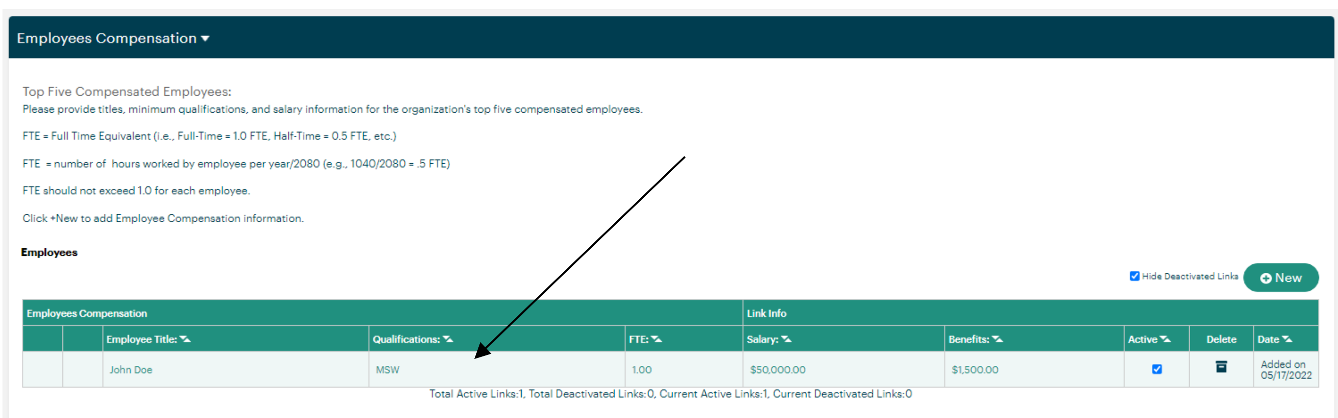
The **Employee Compensation** section requires records for each employee position. Click on the **New** tab when adding an employee record.



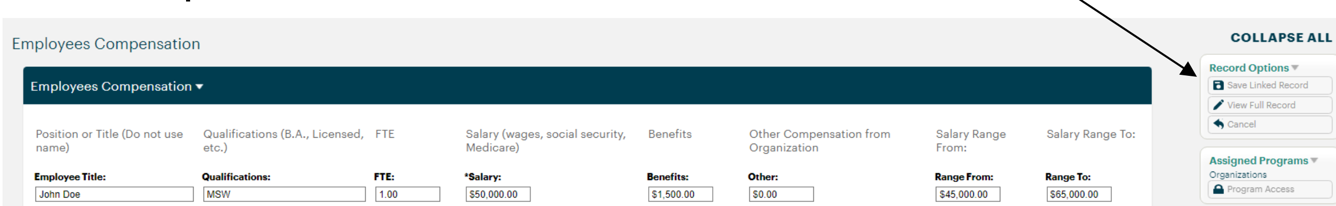
This will open an individual record for each employee.



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



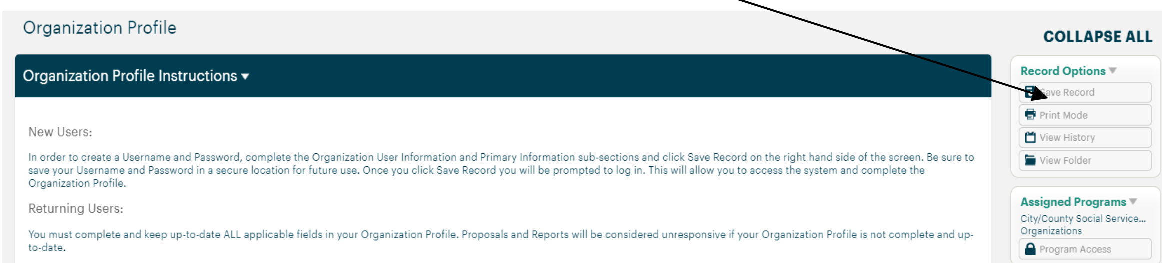
Once the information is added or updated make sure to click on the **Save Linked Record** tab in the **Record Options** box.



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

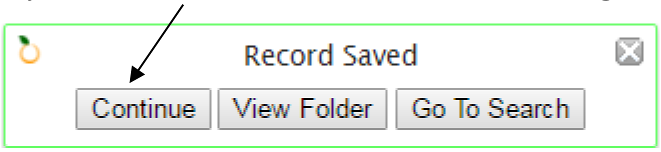
If a board member or employee leaves and that position will not be filled, unclick the **Active** check mark. There is no delete button.

5. 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.

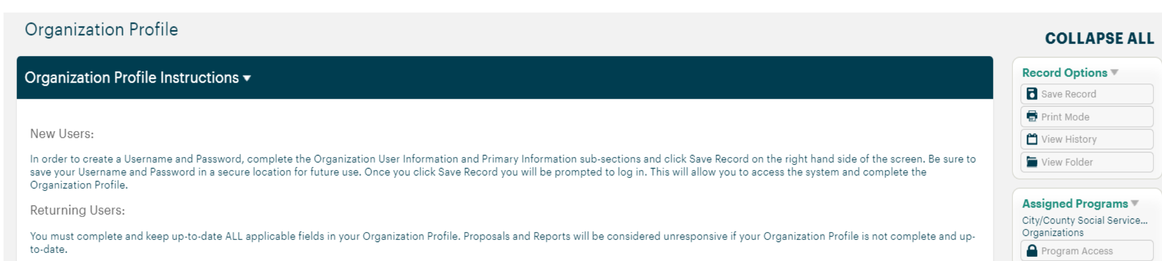


After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

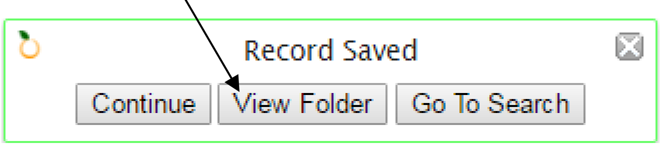
- ❖ If you would like to continue to work on the **Organization Profile**, click on **Continue.**

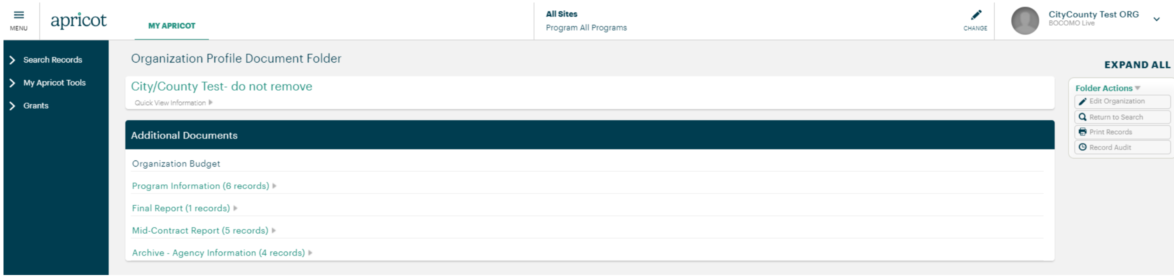


The **Organization Profile** will remain open.

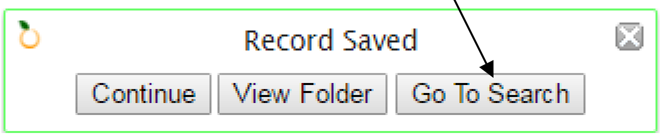


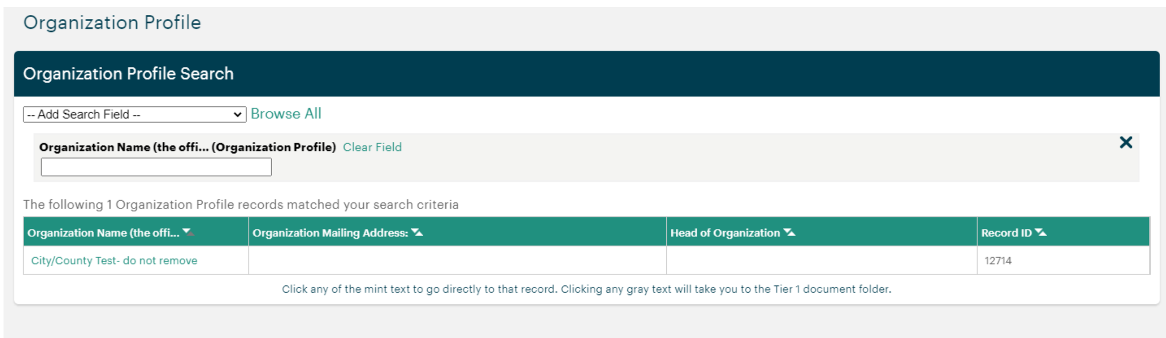
- ❖ If **View Folder** is clicked, you will be navigated to the **Organization Profile Document Folder**.





❖ 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.





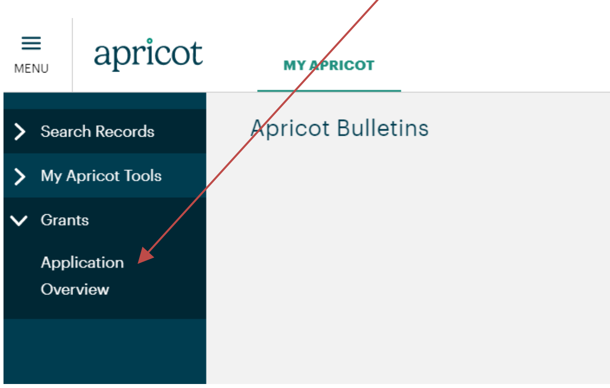
PLEASE NOTE
The **Organization Profile** must be complete and up to date when submitting a proposal. Proposals will be considered unresponsive if any applicable fields are incomplete.

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

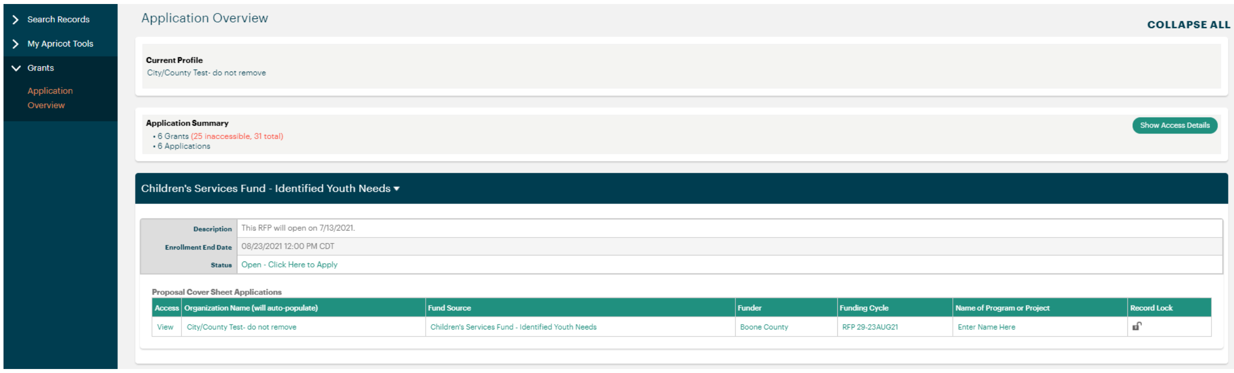
The next step is to create a **Proposal Cover Sheet**.

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

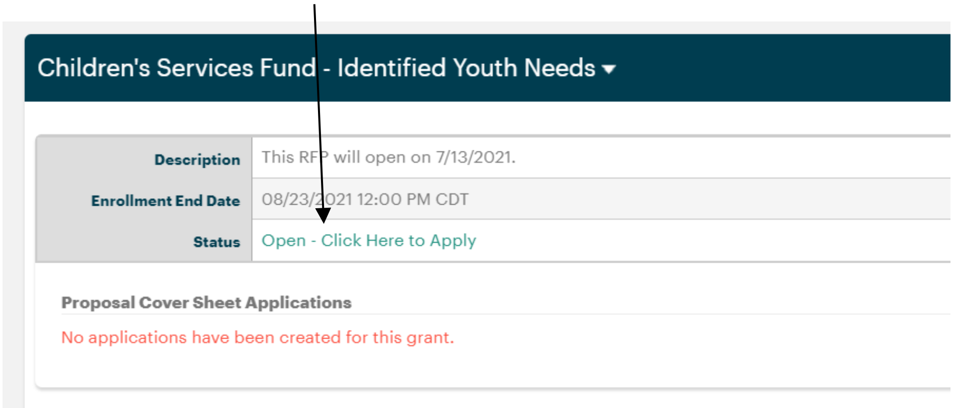


2. This will navigate you to the **Application Overview** page, which will list any **Available** (open) RFPs and RFPs for which you have submitted proposals.

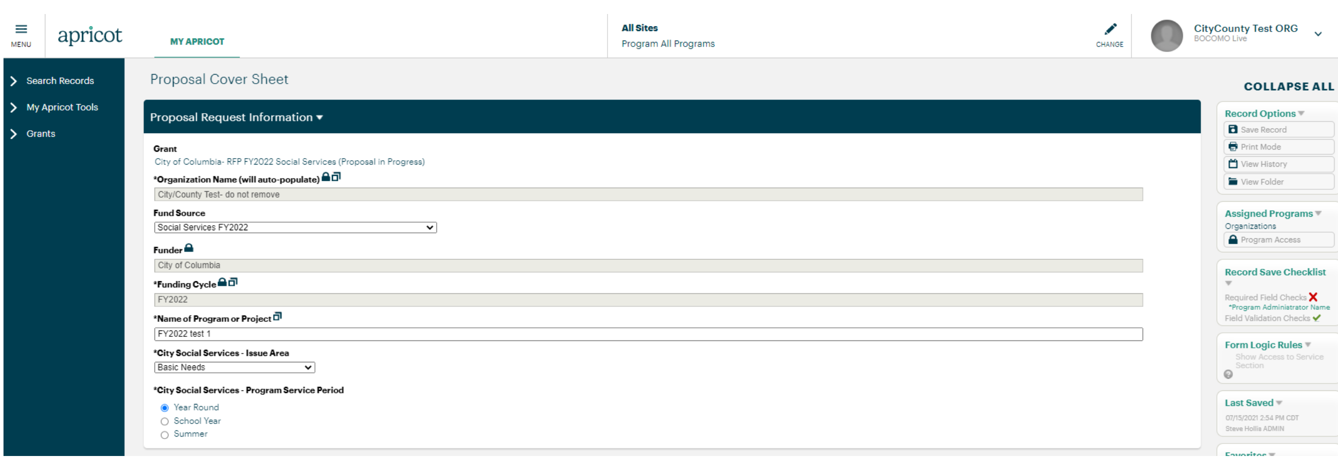
   Make sure you are applying for the correct funding opportunity listed on the Application Overview page. (Images in this instruction guide do not pertain to a particular funding opportunity.)



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

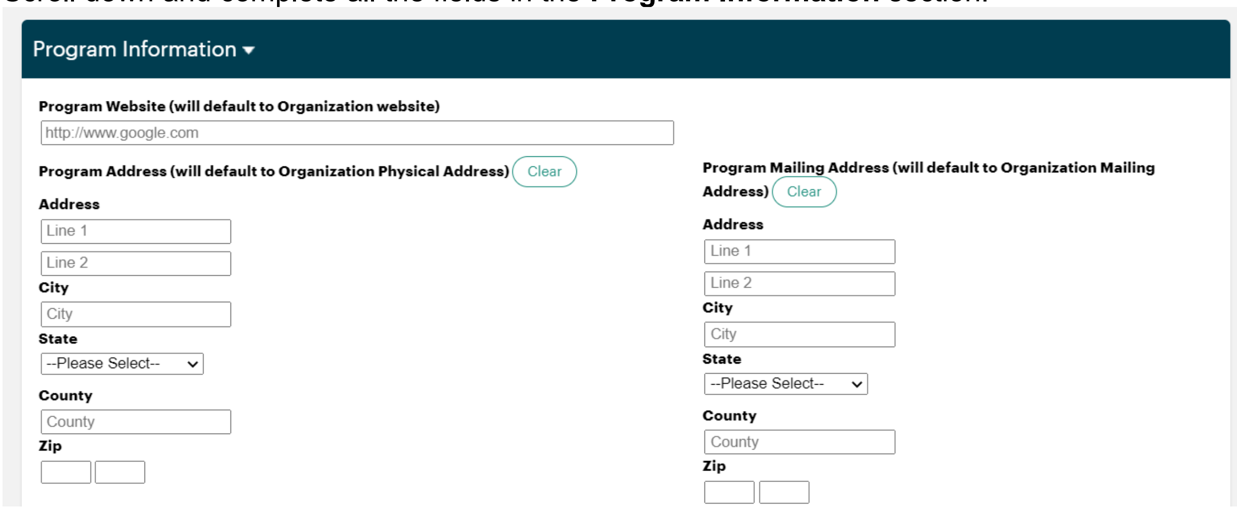


4. Under the **Proposal Request Information** section complete the **Fund Source** (make sure that this matches the RFP for which you are applying, as selected on the **Application Overview** page), **Name of Program or Program**, and the **Amount of the Request**. The **Organization Name**, **Funder**,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

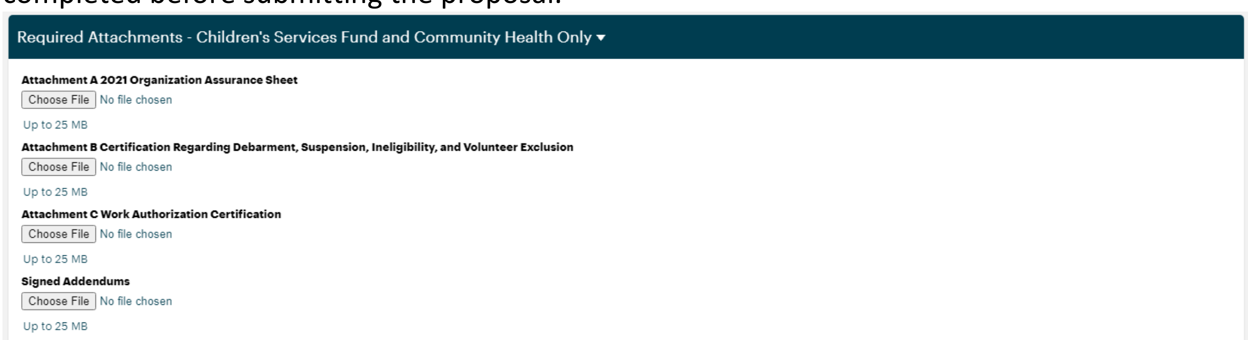


PLEASE NOTE
Be sure the fund source you select matches the RFP for which you are applying, as selected on the **Application Overview** page.

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



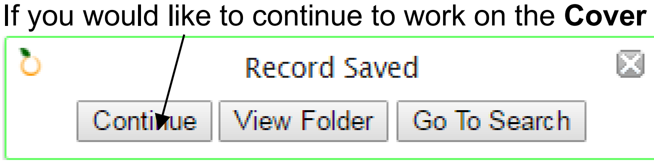
6. Some RFPs require additional **Attachments** or **Addendums** which must be uploaded in the fields provided in the include **Required Attachments** section. As applicable, these fields must be completed before submitting the proposal.



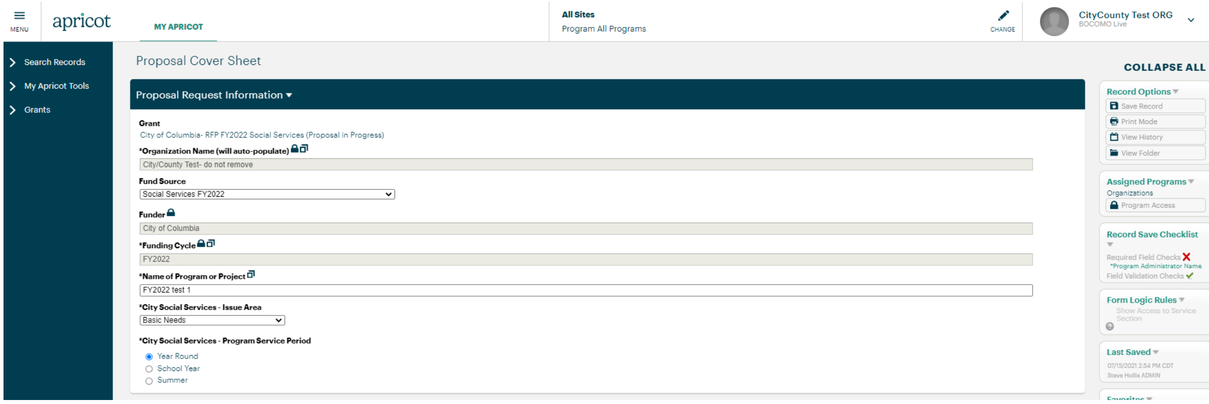
7. To save the information you have entered in the **Proposal Cover Sheet**, click **Save Record** under **Record Options**.

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.

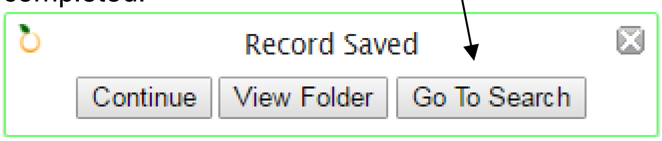
- If you would like to continue to work on the **Cover Sheet**, click on **Continue.**



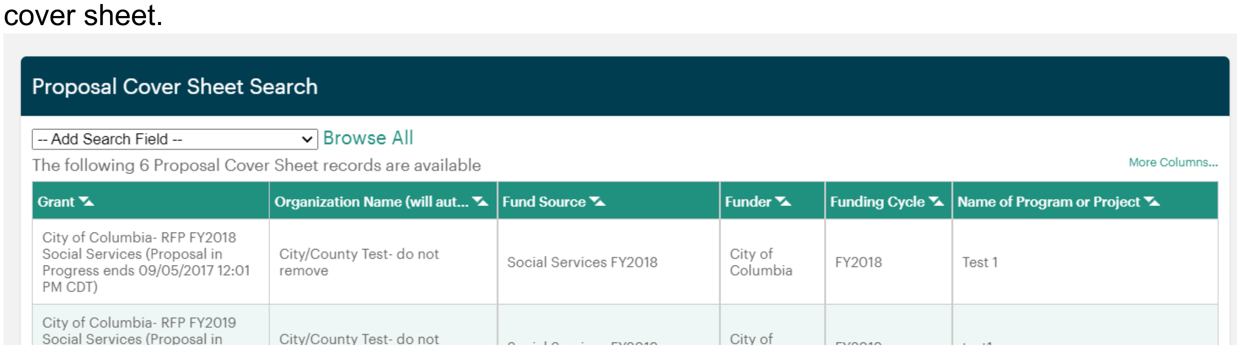
The **Proposal Cover Sheet** will remain open.



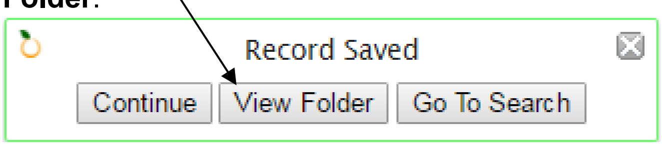
- If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.



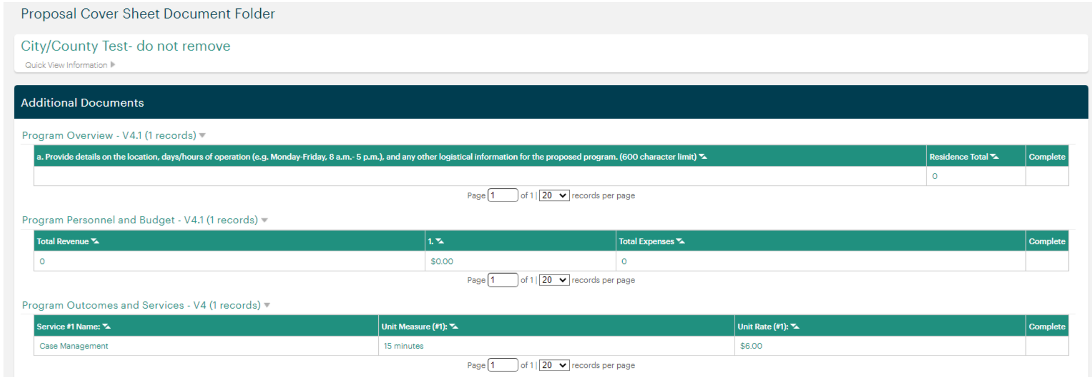
For example, the **Proposal Cover Sheet Search** for this organization indicates the organization has three **Cover Sheets**. Any one of these may be clicked to access the cover sheet.



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



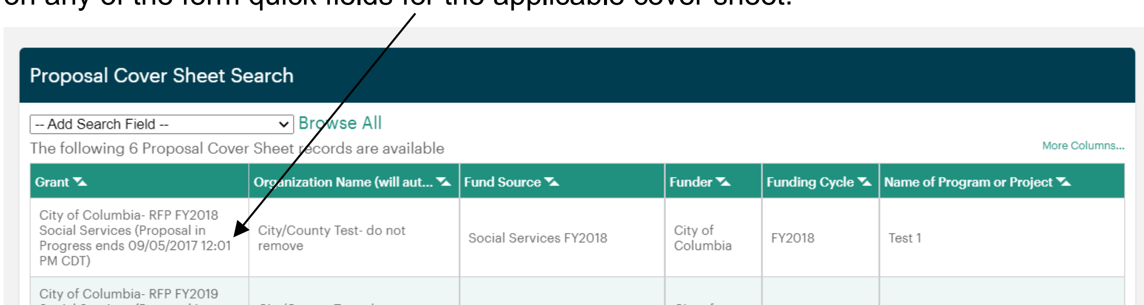
From the **Proposal Cover Sheet Document Folder**, you can begin completing the proposal forms, per Step 3.



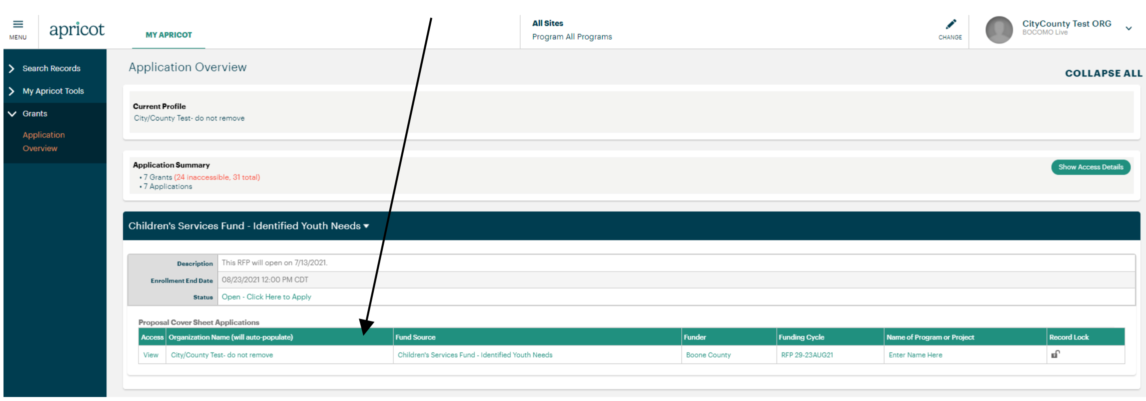
8. You can navigate back to any **Proposal Cover Sheets** you have created by clicking on either the **Proposal Cover Sheet** or **Application Overview** the white navigation menu on the left side of the screen.

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

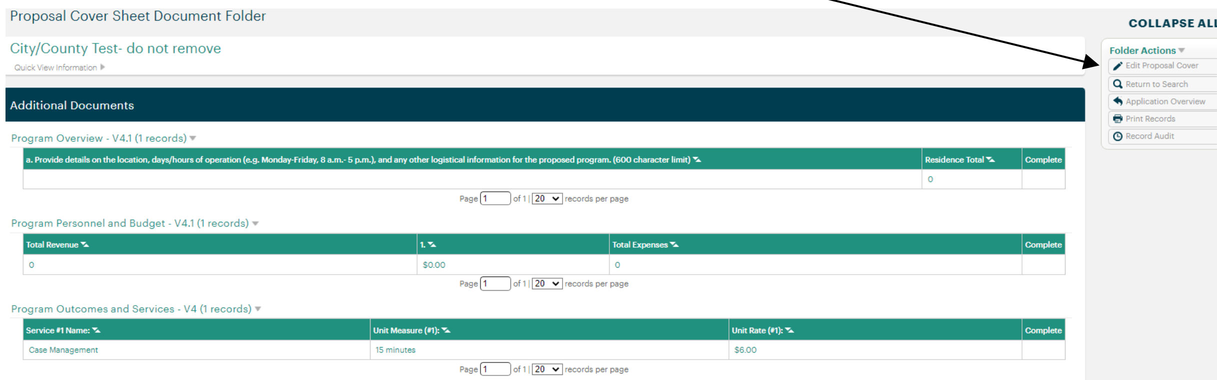
❖ To open the **Proposal Cover Sheet** from the **Proposal Cover Sheet Search** page, click on any of the form quick fields for the applicable cover sheet.



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



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**.



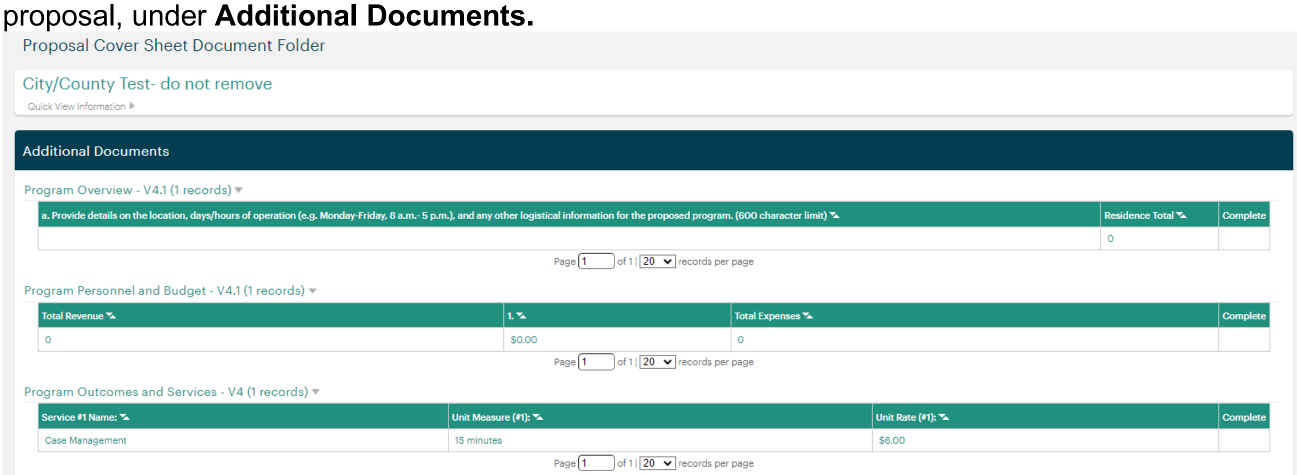
Step 3: Create Proposal Forms

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**.

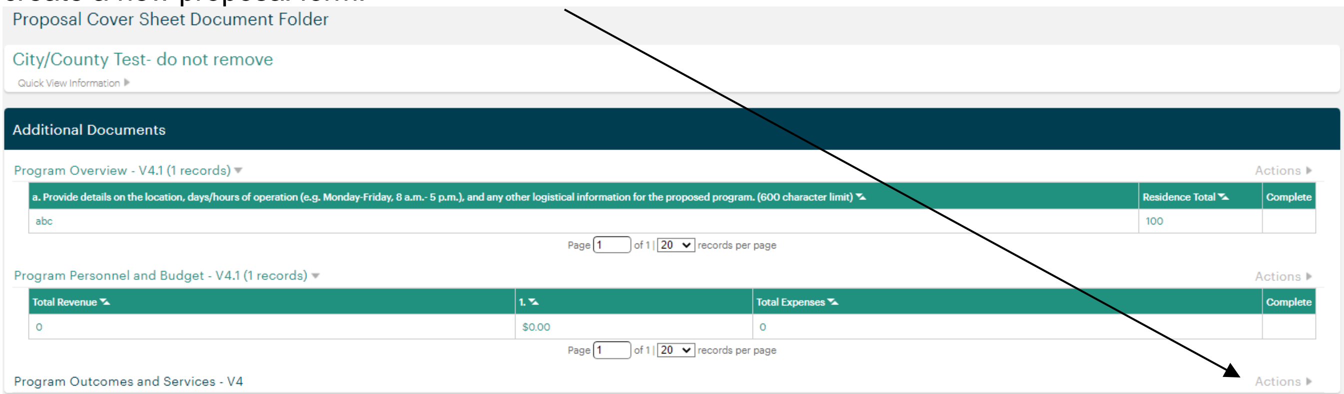
1. Once you have completed the **Proposal Cover Sheet**, you can create the proposal forms.

   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**

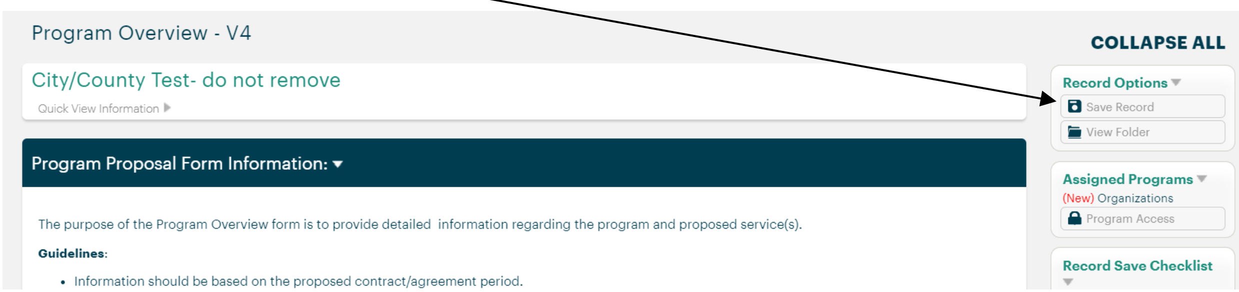
2. To locate the proposal forms, navigate to the **Proposal Cover Sheet Document Folder**, per Section 2.2.8. The **Proposal Cover Sheet Document Folder** contains all the forms for each proposal, under **Additional Documents.**



3. 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.



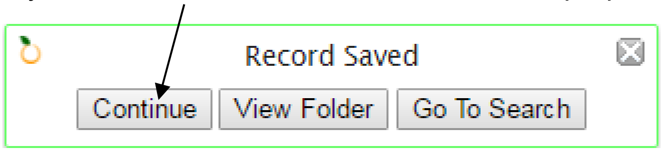
4. To save a proposal form you have created and/or the information you have entered in a proposal form, click on **Save Record**, in the **Record Options** menu.



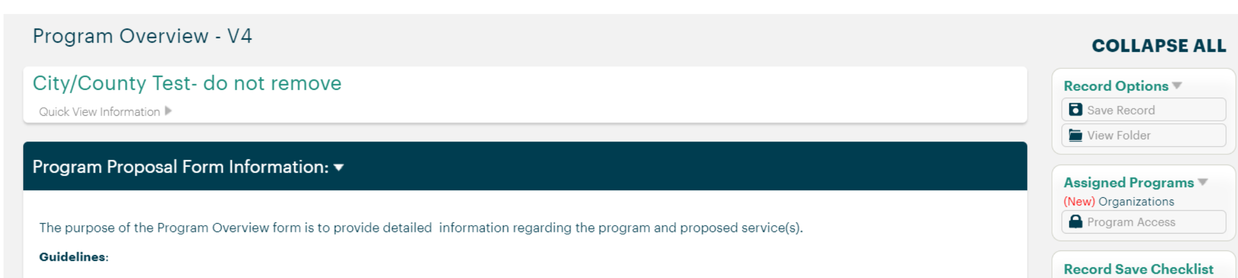
After clicking **Save Record**, a pop up window will appear. This same pop up will appear every time **Save Record** is clicked. You will then choose the applicable action.

- ❖ 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**).

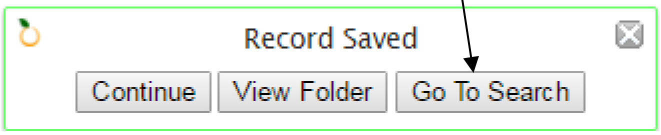
  If you would like to continue to work on the proposal form, click on **Continue.**



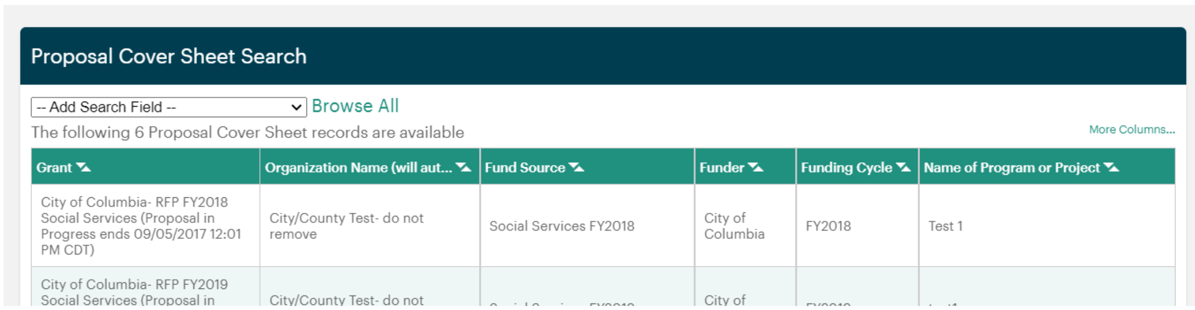
  The proposal form will remain open.



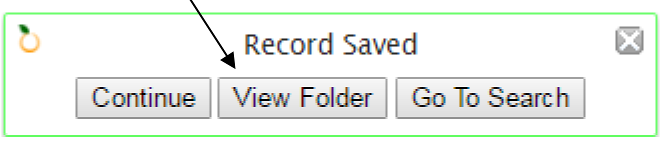
❖ If you click **Go To Search**, you will be navigated back to the **Proposal Cover Sheet Search** that lists all the cover sheets for proposals that the organization has started or completed.

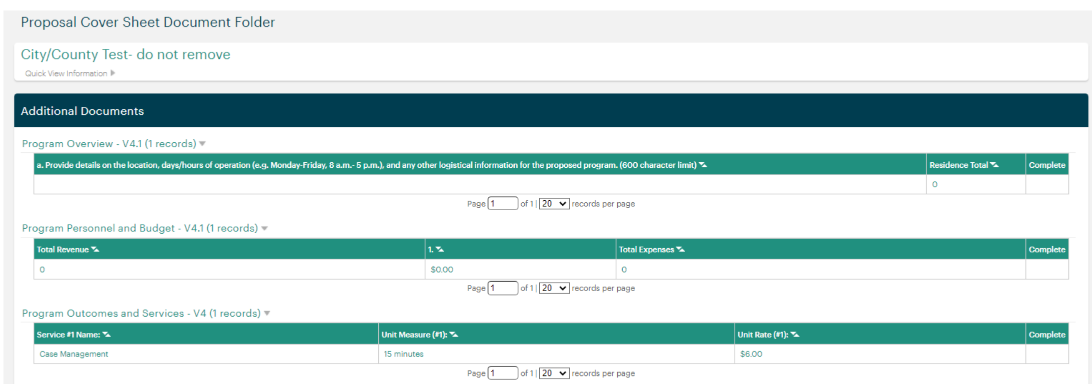


For example, the **Proposal Cover Sheet Search** for this organization indicates the organization has three **Cover Sheets**. Click any of the form quick view fields to access the applicable cover sheet.

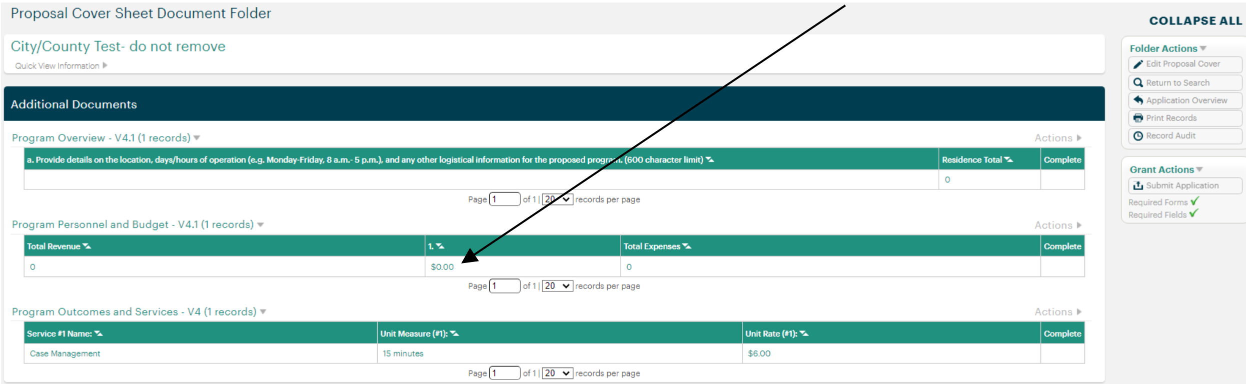


❖ If **View Folder** is clicked, you will be navigated to the **Proposal Cover Sheet Document Folder**.





5. 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.



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:

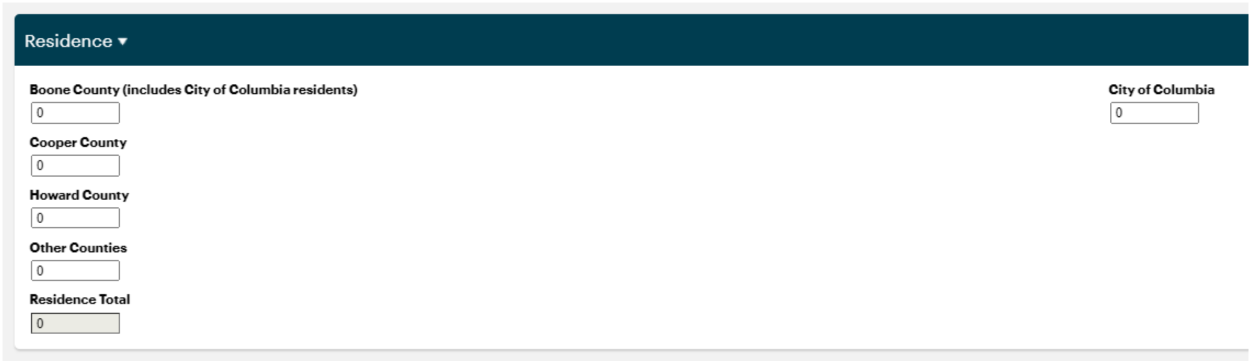
- ❖ Be sure to thoroughly read the instructions for each form and section.
- ❖ The time period of the proposed year is indicated in each RFP.
- ❖ The total amount proposed should be the same in the Program Overview form, Program Outcomes and Services form, and Proposal Cover Sheet.
- ❖ Remember to save 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
    - o The totals in each sub-section should match one another and should match the total number of unduplicated individuals to be served.
    - o 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)
0
City of Columbia
0
Cooper County
0
Howard County
0
Other Counties
0
Residence Total
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.
    - o Only one data point should be included in each Indicator %, Indicator, and Method of Measurement field.
    - o 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.
    - o 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.
    - o 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.

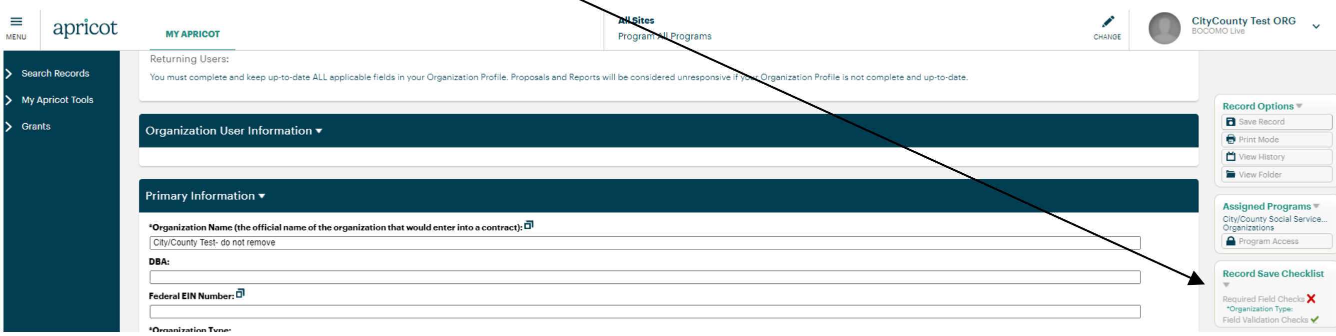
Step 5: Review Proposal

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.

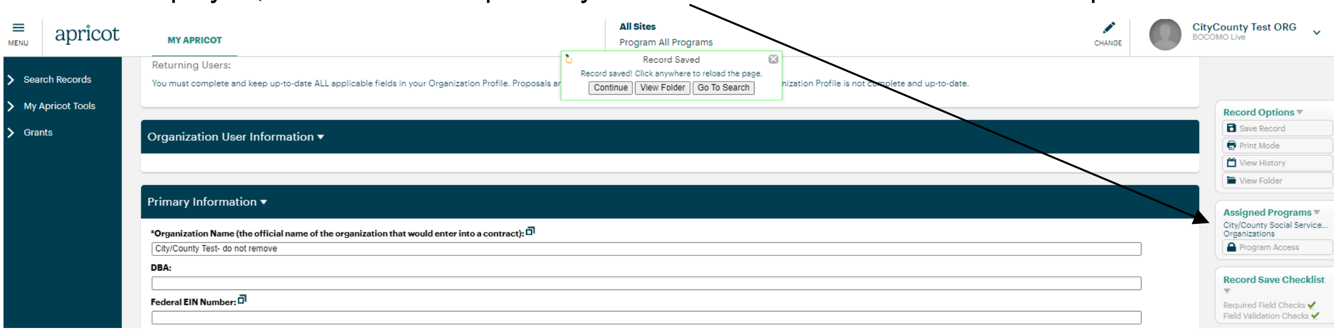
1. Review the **Organization Profile** to be sure all applicable fields are complete.

   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.



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

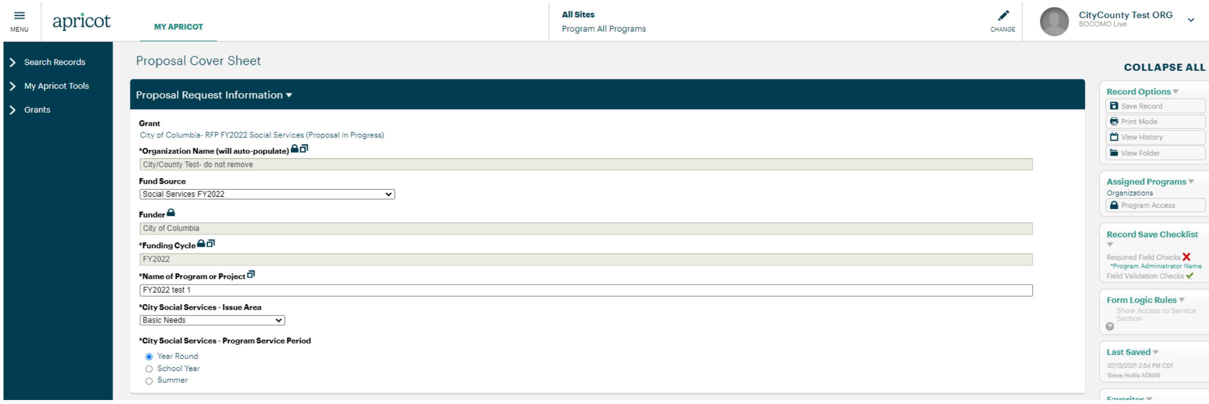


   However, most of the fields in the **Organization Profile** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Organization Profile.**

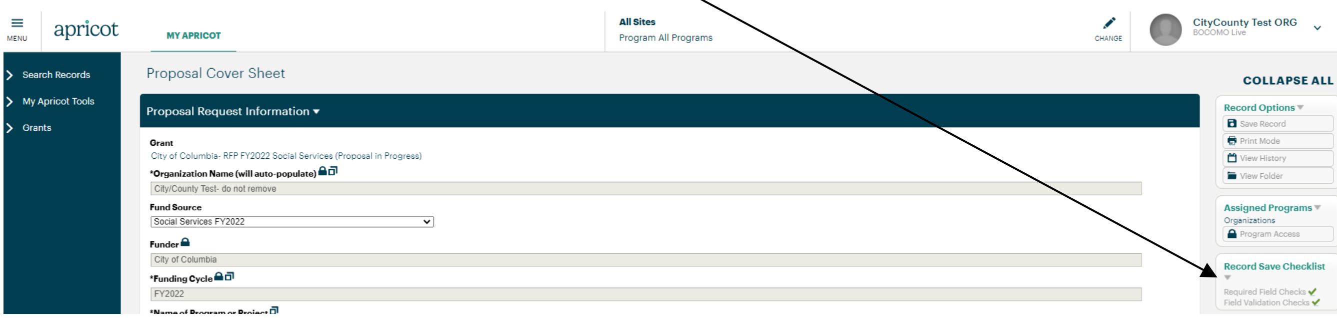
2. Review the **Proposal Cover Sheet** to be sure all applicable fields are complete.

   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.

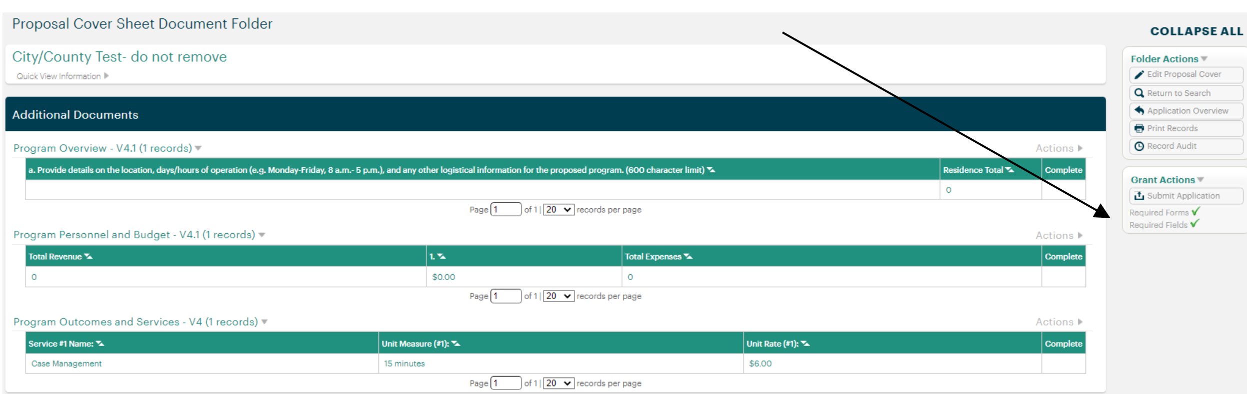


However, most of the fields in the **Proposal Cover Sheet** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Cover Sheet**.

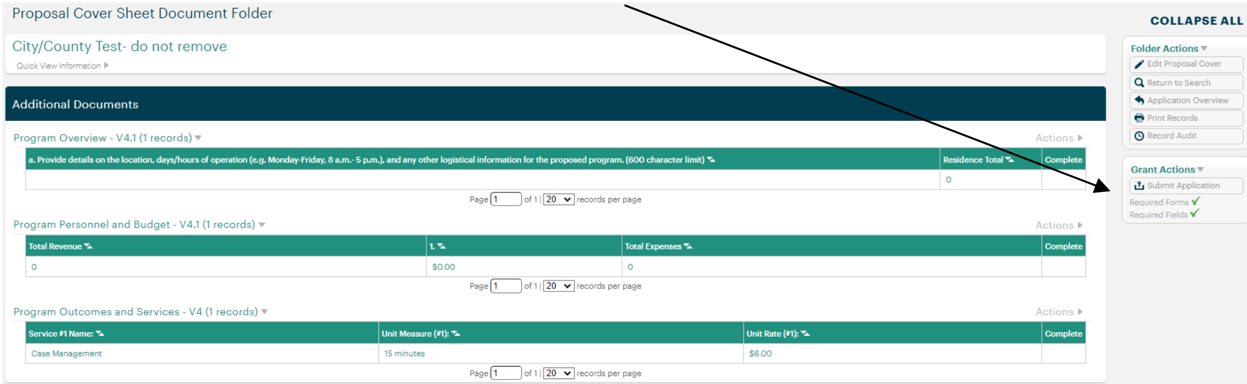
3. Review the **Proposal Cover Sheet Document Folder** to be sure all required proposal forms were created.

   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.



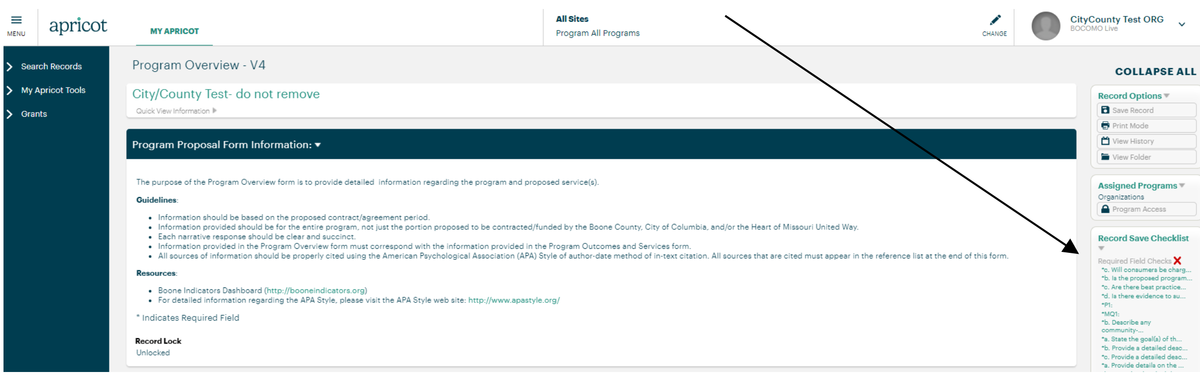
If a "✓" is displayed, the required proposal forms are present.



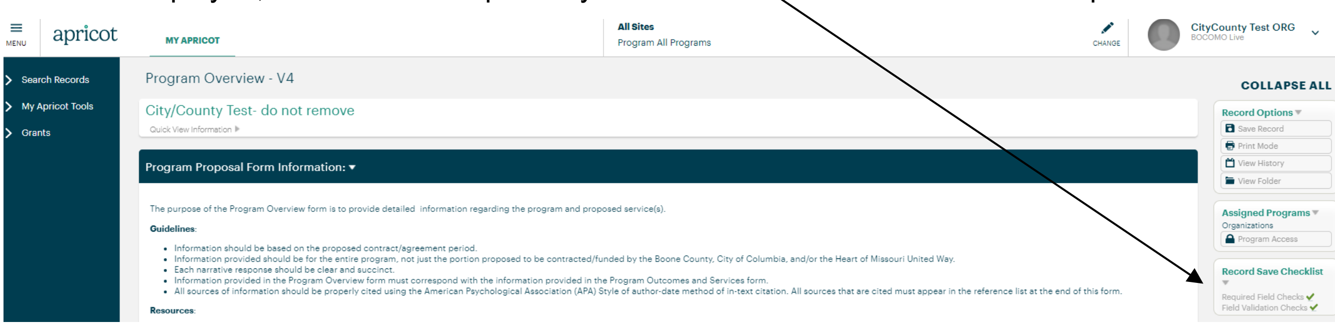
4. Review the **Proposal Forms** to be sure all applicable fields are complete.

   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.



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

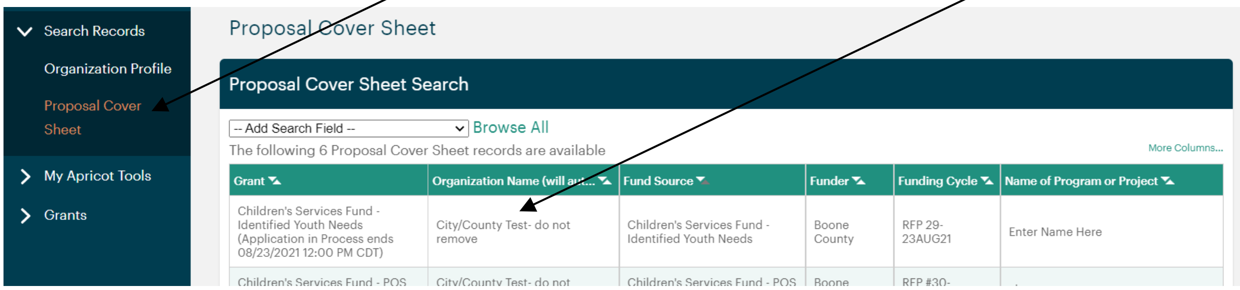


   However, most of the fields in the **Proposal Forms** are not required form fields but are required to be completed. Therefore, please do not use the **Record Save Checklist** as an indicator of completeness of the **Proposal Forms**.

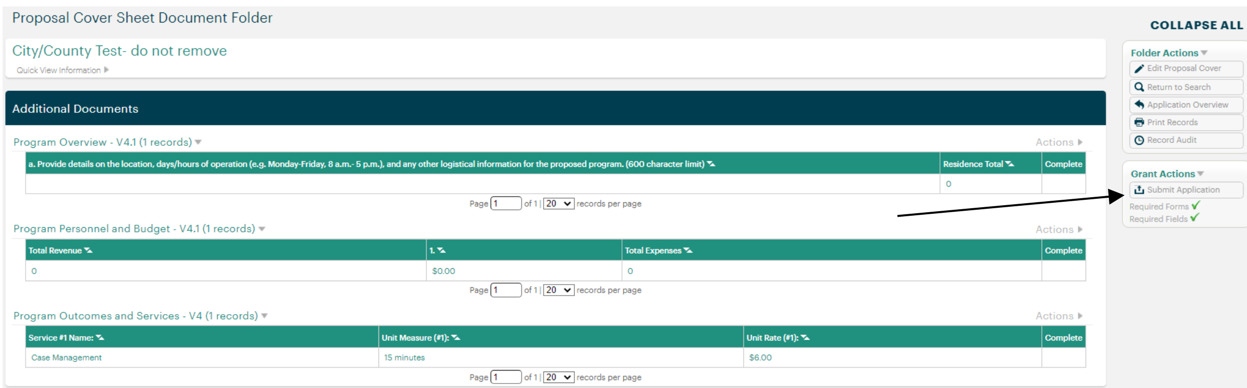
Step 6: Submit Proposal

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

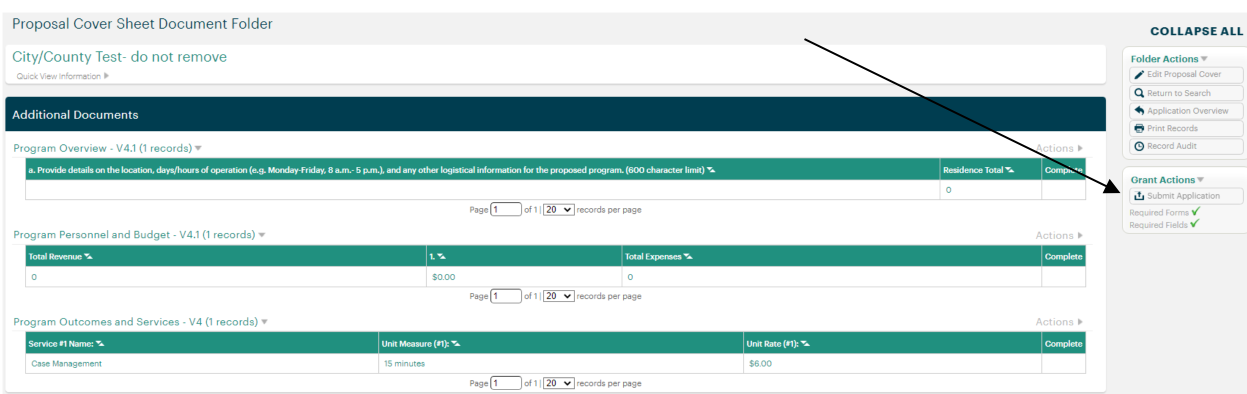
1. Return to the **Proposal Cover Sheet Folder** and click on the applicable **Proposal Cover Sheet** for the proposal being submitted.



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



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

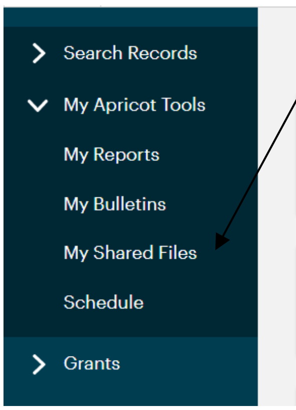


PLEASE NOTE

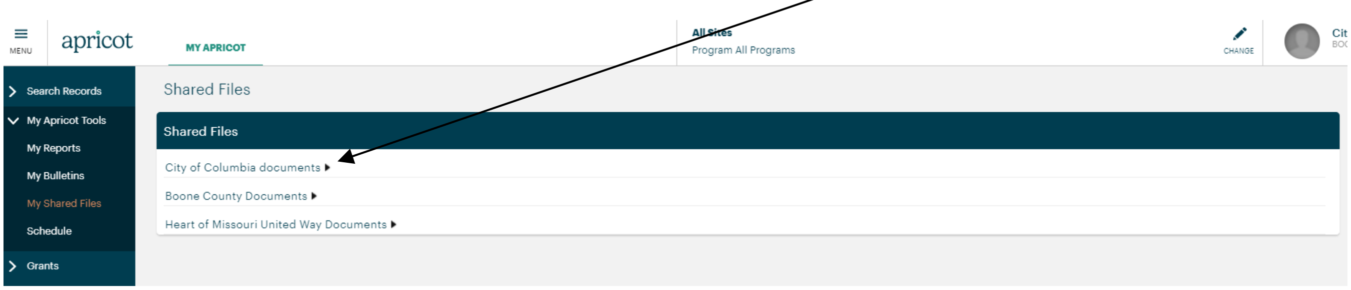
- Once submitted, the proposal forms are locked and can no longer be edited. If you inadvertently submit a proposal prior to the submission deadline, contact the applicable funder to re-open the proposal forms.
- You must submit each proposal individually following the actions outlined in **Step 5:**

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. *(**Please Note:** 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 **Additional Documents** 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.