



BERNALILLO COUNTY



WE'RE MORE THAN YOU THINK



Bernalillo County Strategic Plan

The mission of Bernalillo County is to be an effective steward of county resources and a partner in building a high quality of life for county residents, communities and businesses.

Government Accountability
Public Safety
Public Infrastructure
Community Health
Economic Vitality



Office of Health and Social Services

The Office of Health & Social Services provides health and quality of life initiatives for Bernalillo County residents to improve economic well-being, education, health, and family & community development.



EFFECTIVENESS

Improve internal efficiencies to maximize funding levels for Social Service program awards.



ACCOUNTABILITY

- Compile information and data that demonstrates impact and effectiveness of funded programs.
- Adhere to Bernalillo County policies, procedures, rules, and regulations.
- Fair, equitable and transparent process.



CUSTOMER SERVICE

- Provide support and technical assistance to awarded agencies.
- Continue to be a good resource to the community with regards to County-wide Social Service needs.

History



FY10 and Prior – RFP for Social Service solicited every 4 years with 16 Social Service program categories; excluded events



FY10 - AR 60-2009 adopted guidelines for Social Service Program RFPs over 10K and Social Service Program and Community Event Sponsorship RFQs under 10K



FY10 to 14 – Social Service RFP resulted in 27 awards with an annual budget of 1.3 million; 66,000 clients and families impacted



FY14 - AR 2014-43 was adopted authorizing County Manager to solicit, evaluate and award certified non-profits Social Service Programs and Community Event Sponsorships via an RFP process contingent on funding



FY15 - 25 Awards for 1 year with option to extend for an additional 1 year; Contracts span January to December

Types of Funding Requests



Request for Proposals (RFP) for Social Service Programs

- Multiple Awards
- Multiple Year Awards
- Typically fund over \$10K per Award
- Average Annual Award; \$41,000
- Average number funded; 26
- Average Budget \$1.2 million



Request for Proposals (RFP) for Community Event Sponsorships

- Multiple Awards
- One Award per year per Agency
- Typically funder under \$10K per Award
- Average Award, \$5,276
- Average number funded annually; 43
- Average Budget \$238,000

RFP Structure



- **State of New Mexico Constitution**
- **State Procurement Code NMSA 1978**
- **County Policies, Procedures, Rules, and Regulations**
- **Procurement Guidelines**



- **Bernalillo County Strategic Plan**
- **Budget**
- **Eligibility and Submittal Requirements**
- **Program Scope of Services**
- **Evaluation Criteria**
- **Evaluation Process with an Independent Evaluation Committee**

RFP Submittals:

Are Results Based



**Address
Community
Needs**



**Maximize
Impact on
Community**

**Target
Vulnerable
Populations**

MODEL RFP SUBMITTALS



KEY COMPONENTS OF RFP SUBMITTAL



Responsive



Agency's Capability and Capacity



Quantification of Need



Agency Identification



Budget



Program/Event Description



Agency's Plan to Monitor, Evaluate and Report Results

USE 'SMART' GOALS



S Specific, Significant



M Measurable, Meaningful



A Agreed upon, Attainable, Achievable,
Acceptable, Action-oriented (direct services)



R Realistic, Relevant, Reasonable, Results-oriented



T Time-based, Timely, Tangible, Trackable

RESPONSIVE



- ❖ Read proposal thoroughly to identify all **Mandatory Requirements**
- ❖ Meet submission **Deadline; late proposals are not excepted**
- ❖ Mandatory means the terms “**must**”, “**shall**”, “**will**”, “**is required**”, or “**are required**”, identify a mandatory item or factor. Failure to meet a mandatory item or factor *may* result in the rejection of the proposal

Currently the following will result in a proposal being deemed ‘*Non-Responsive*’

- Statement of Concurrence – Pay Equity Reporting Requirements
- Campaign Contribution Form

AGENCY IDENTIFICATION



Introduce your Agency

- ❖ How long has your Agency been in existence
- ❖ Include 'Mission Statement'
- ❖ Provide Agency objectives
- ❖ Provide a Brief Agency History
 - Emphasize experience working with your target population
 - Emphasize experience addressing identified need

QUANTIFICATION OF NEED



- ❖ Explain, in detail, the Need or Problem the Program will address
- ❖ Quantify Need/Problem's pervasiveness within Bernalillo County
 - Impact, Trends, and cost to community and families
- ❖ Provide research data, studies, statistics, and/or historic Program information that demonstrates effectiveness in impacting target populations

AGENCY'S CAPABILITY AND CAPACITY



- ❖ Identify Agency's expertise and experience in providing services with relationship with target population
- ❖ Define Organization structure and Staff Certification, Education, and Experience
- ❖ Share successes in implementing similar programs
- ❖ Outline Agency's plan to utilize resources in facilitating outcomes
- ❖ Demonstrate Agency's ability to implement the plan
- ❖ If new provider of services, how have you prepared for providing services and established plan for implementation
- ❖ How will funding be utilized to enhance Agency's capability and capacity

PROGRAM/EVENT DESCRIPTION



- ❖ Describe how the Program aligns with the desired results identified in the Bernalillo County Strategic Plan
- ❖ State approach to Program activities and use of resources
- ❖ Provide agency agreements (MOU) and other documentation illustrating your Agency ability to provide or link clients to services
- ❖ Indicate methods your Agency will use for documenting:
 - Client Intake
 - Participation
 - Provided Services/deliverables
 - Outcomes

BUDGET



- ❖ Revenue Form
 - Current Fiscal Capacity
- ❖ Proposed Program/Event Budget; planned expenditures
 - Proposed 'eligible' use of Bernalillo County funds
- ❖ Proposed Personnel Services Budget
 - Direct Service Personnel

Plan to Monitor, Evaluate and Report Results



- ❖ Set goals for both Deliverables and Desired Outcomes
- ❖ Specify how the services of Partners will be documented and verified; responsibilities and lines of authority
- ❖ Prepare to develop solid Performance Measures; County will assist
- ❖ Establish methods for 'documenting and verifying'
 - ***If it is not documented, it didn't happen!***

PULL IT ALL TOGETHER



CONTACTS

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OR

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Grant Writing Basics

Center for Nonprofit Excellence

Tsiporah Nephesh

- Program Coordinator, Center for Nonprofit Excellence, United Way of Central New Mexico
- Center for Nonprofit Excellence provides training sessions, resources and community connections to help strengthen the capacity of nonprofits throughout New Mexico

Different Sources of Grants

- Federal
- State
- Foundations:
 - Community, Family or Corporate
- Federated Giving Programs:
 - United Ways

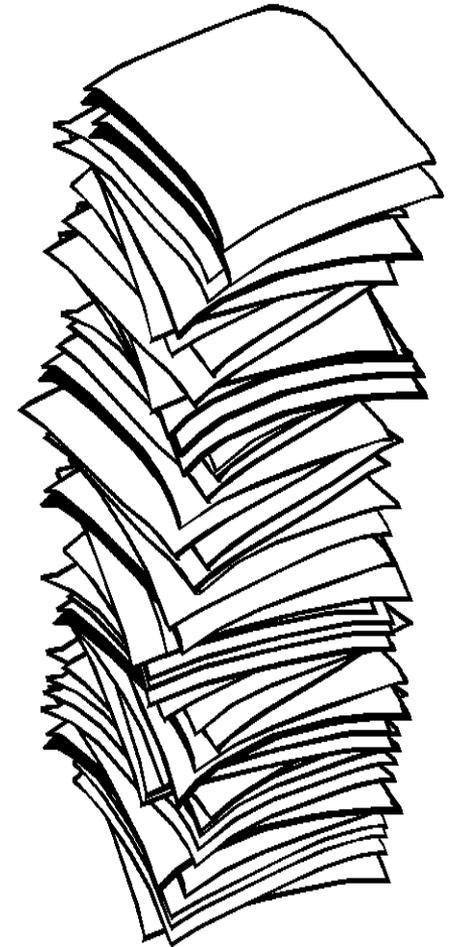
Understand the Funder's Perspective

- Funders have goals and objectives
- Funders are seeking nonprofit partners to help them achieve their mission
- Building a relationship with the funder is important



Understand the Funder's Perspective

- For each grant opportunity, there are more applications than there are funds



Understand the Funder's Perspective

- Don't assume that the reviewer knows anything about your organization or the circumstances in New Mexico
- Sometimes funders reach outside their organization for reviewers



Understand the Funder's Perspective

- Funders have different methods for sorting through all the grant applications
- Incomplete applications are often not considered at all



Do Your Homework

-  Research the funder's priorities, guidelines and restrictions
-  If you're unsure about a match, contact the funder and ask



Grant writing and
grant planning
involves the whole
organization:
program staff, ED,
finance,
development



Take a moment to list all the people in your organization who should be involved in the grant planning process

Grant Writing Components

- Grant research
- LOI
- Cover Letter
- Needs Statement
- Goals and objectives
- Program Plan
- Program Budget
- Evaluation
- Collaboration information
- Sustainability
- History
- Attachments
- Follow up

Grant Research



- Research funders to ensure your proposal fits within the grantmaker's priorities
- Check the average grant \$
- Read restrictions and guidelines

Grant Research



- **Ask these questions:**
- What are the foundation's priorities?
- What is it trying to accomplish?
- What kinds of programs does it support?
- Who else has it funded?
- What size grants does it make?
- Are there any restrictions?
- What are the application guidelines?
- What is the submission deadline?

Grant Research



- **Conduct Additional Research**
- Start with the New Mexico Grantmakers Directory
- Go to Funder's website for details and deadlines
- Check on GuideStar to see who they've funded and the size of grants (review 990)

LOI



- **Letter of Interest/Inquiry/Intent**
- Introduction
- Briefly identify need
- Briefly describe proposed solution
- Amount requested
- Contact information
- Closing and signatures

Cover Letter



- *Briefly* identify your organization, describe the program plan and state the dollar amount of the request
- Include name and contact information for grant
- Address the letter to a specific person
- Be enthusiastic

Needs Statement



- **Needs Assessment / Problem Statement / Needs Statement**
- Delineate the problem or issue to be addressed
- Include data *and* a human interest story

Needs Statement



- **Stories**
- Sketch the outline of a story that illustrates the need and how your organization has helped to address the need

Goals and Objectives



- What you will accomplish and the steps to do so
- One is broad, and defines the overall purpose of the program
- The other is the measurable changes expected

Goals and Objectives



- **Use SMART Goals:**
- **S**pecific
- **M**easurable
- **A**ttainable
- **R**elevant
- **T**ime-bound

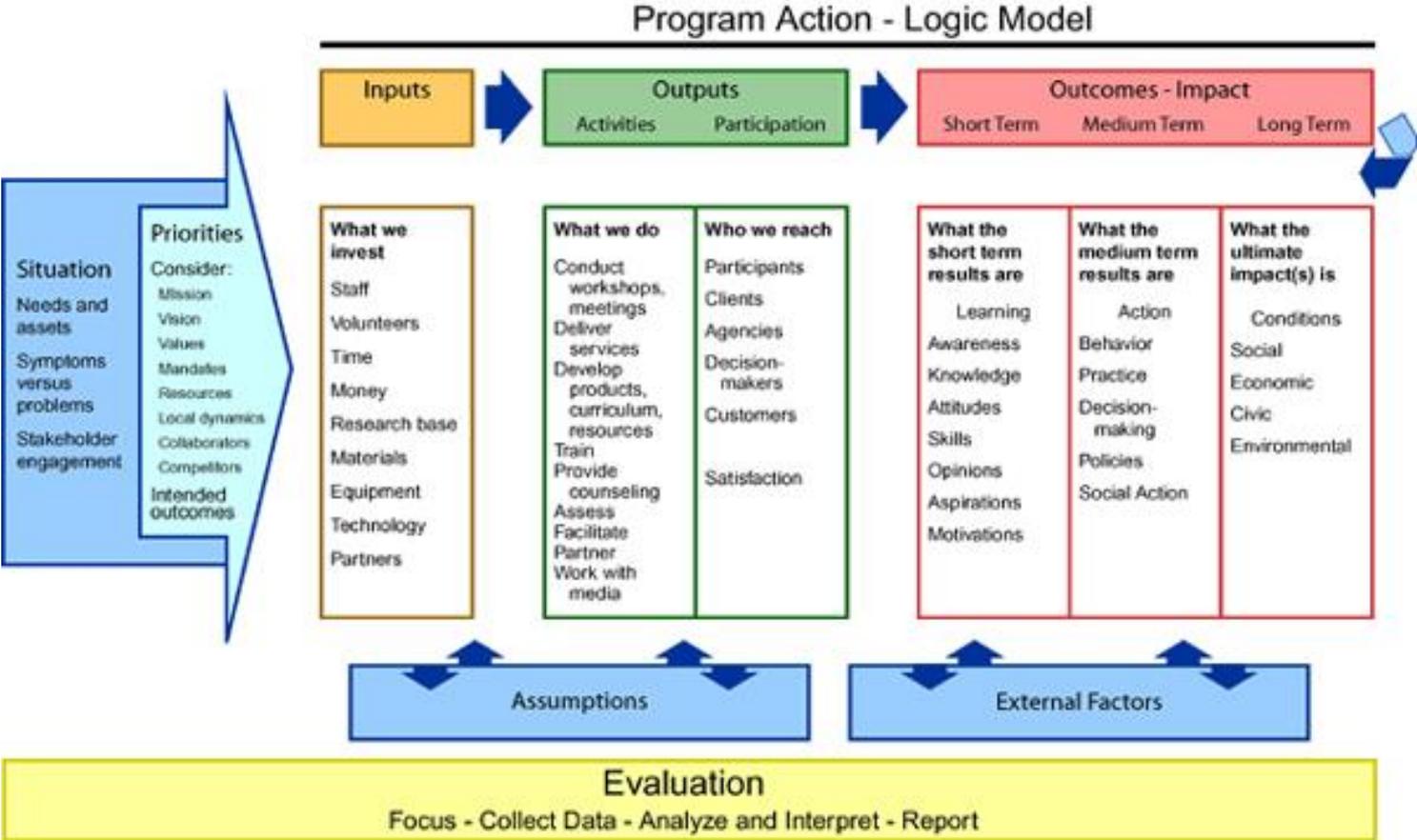
Program Plan



- **Program Plan / Proposed Project / Project Design**
- Your organization's plans to address the community need
- Why or how this will be effective and how it is unique or different

Program Plan

- Logic Model Example



Program Plan



- **Answer these questions:**
- What is the plan to address the problem or issue?
- Why have you chosen that approach?
- Who will the program serve?
- What is the benefit to the client? community? funder?
- Why will the proposed project make a difference?
- What activities will be implemented?
- How will the plan be carried out?
- Who will do the work? Do they need training?
- What facilities, equipment and supplies will be needed?
- Is there a collaborative component?

Program Budget



- All the expenses to implement the program: salaries and benefits, overhead, supplies, transportation, technology, administrative expenses, evaluation

Program Budget



- **Consider:**
- Personnel expenses
 - Salaries + benefits
 - Percentage of ED's time
 - Special training
- Overhead/facilities
- Supplies
- Contract services
- Transportation
- Other
 - Telephone and cell phones
 - Copying and printing
 - Mailing
 - Insurance related to program

Program Budget



- Use Functional Expenses to allocate costs appropriately
- Consider all the costs associated to deliver the program
- Include evaluation costs

Evaluation



- Describe plans to assess the program and measure impact
- Measurement and evaluation should relate to the objectives of the program plan and funding request

Evaluation



- **Consider:**
- What major accomplishments must be reached to attain each outcome?
- Is it measurable?
- Does the plan include both quantitative and qualitative measures?
- What very specific actions need to be undertaken to fulfill the program goal?
- How will progress be measured?
- What evaluation tools will be used?
- How many can be served in what time period?
- How will the results be reported?

Collaboration Information



- Describe how your organization will work with other groups to leverage resources

Collaboration Information



- Create a list of all the groups with whom your organization collaborates

Sustainability



- **Other Funding / Sustainability**
- Identify other funding sources
- Plans to continue the work past the end of the grant
- Contingency plans for how you will carry out the work if you receive only partial funding or none at all

History



- **Qualifications / History / Organizational Background**
- Brief history of the organization, highlight accomplishments and expertise
- Describe ability to do the work proposed

Attachments



- **Attachments / Appendices**
- May include:
 - » IRS letter of determination
 - Most recent IRS Form 990
 - List of Board Members and affiliations
 - Current Financial Statements
 - Audited Financial Statements
 - Anti-Discrimination policy
 - Letters of support

Follow Up



- If you receive funding, send a thank you note and find out how the funder wants the grant to be acknowledged
- If you don't receive funding, ask why so that you can improve your application next time

Connect All the Pieces

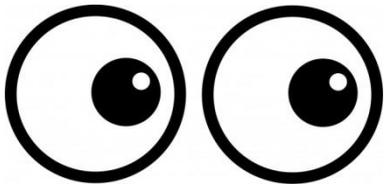


General Tips

- Don't miss the deadline
- Follow the instructions
- Answer all the questions, don't skip sections
- Don't use jargon or acronyms, only use abbreviations after defining them
- Use the funder's language
- Give them what they are asking for
- Don't promise more than you can deliver

General Tips

- Respect word and character limits
- Spell check
- Double check the math in the budget



- Have someone else read through the grant application

General Tips

- As you are reading over the proposal, keep asking “why” and “so what” to ensure that you have provided all the information a reviewer will need
- Focus on the clients, not your organization
- Don’t rely on just one funder

General Tips

- Answer all the questions, provide all the attachments requested
- Don't give more than requested
- Remember reviewers will be reading dozens, if not hundreds of applications

Additional Training



Grant Skills Workshop

UNM Anderson EPEC

Wednesdays,

June 10 - 24,

6:00 - 9:00 pm



Essential Grant Writing Skills

Center for Nonprofit
Excellence

June 10,

9:00 am – 3:00 pm



Introduction to Finding Grants

Albuquerque Library
Main Library

June 11,

10:00 - 11:30 am

Resources

- New Mexico Grantmakers Directory: www.nmgrantmakers.org
- Grant Opportunities Calendar by The Grant Plant:
 - www.thegrantplantnm.com/upcoming-grants
- *Grantsmanship: Program Planning & Proposal Writing* by Norton J. Kiritz
- Hemingway App: www.hemingwayapp.com



Contact

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