1 **Scope of Work**

1.1 **Determination of Staff Training and Proposal Development Needs**
At the initiation of this contract, Glen Price Group (GPG) staff will engage County of Sonoma department heads as directed by the County Administrator’s Office to determine: priorities for outside funding, potential funding prospects, and staff development needs. If possible, the County Administrator’s Office (CAO) will facilitate the introduction of the GPG’s work and contract during one of the monthly department head meetings after which GPG will schedule one-on-one meetings with department heads.

An important focus of this work will be the identification of staff training needs, potential staff training participants, and coordination of staff training needs with department strategic planning and proposal development activities. Working with department heads and designated staff, GPG will discuss opportunities to assist with departmental team building, multi-departmental efforts, support for the development of public/private partnerships, and assistance in relationship development/building initiatives with funding agencies.

The County will provide GPG with a supervising point of contact in the County Administrator’s office who will provide GPG with any necessary guidance with regard to County priorities, procedures, and protocols.

1.2 **Prospect/Opportunity Identification**
As a core service provided to the County of Sonoma, GPG will monitor relevant federal, state, and private funding opportunities through both online search and data systems, and through personal relationships with donors and grantmakers.

1.2.1 **Funding Opportunities Report**
The GPG will scan funding opportunities for Sonoma County and, on a regular basis, GPG will produce a Funding Opportunities Report that will be emailed to the County Administrator’s Office and to designated Sonoma County personnel. As detailed in the GPG proposal submitted to the County of Sonoma in response to the “Grant Writer Services and Grants Locator Services” RFP, this newsletter will direct departments to specific opportunities described on eCivis’ *Grants Network: Research*. If the County selects a different provider than eCivis for grant research services, GPG will align its work with their systems in a similar fashion. To facilitate this work, the County of Sonoma will provide GPG with a minimum of three *Grants Network: Research* accounts. GPG will complement the eCivis database with its own subscription to the “Foundation Directory,” which GPG will provide to the County at no additional charge to conduct private foundation-related research for County departments and projects.

1.2.2 **Bid/No-Bid Analysis**
As potential funding opportunities are identified that are of interest to Sonoma County, GPG will facilitate a “go/no-go” or “bid/no bid” decision-making process. This incorporates an analysis of the feasibility of pursuing a given opportunity. The “bid/no bid” analysis will take into consideration some or all of the following factors (as well as any others identified by the County):
The Glen Price Group

- Existing or anticipated County program or need;
- Level of potential competition and potential for successful grant procurement;
- Impact of proposal preparation process on County staff;
- Potential benefits for the County; and
- Any identifiable advantages/disadvantages of grant and contract award.

The “bid/no bid” analysis will be formulated in conjunction with authorized County representatives who will then approve GPG proceeding with next steps on proposals and/or related work.

**Outcome/Product:** The Glen Price Group will provide the County with Funding Opportunity Reports for public (federal and state) funding prospects. As directed by the County, GPG will execute bid/no bid analyses of opportunities as they arise. Based on the outcome of the bid/no-bid analysis, GPG will begin the proposal development process.

1.3 **Staff Training**

Formal Staff Training sessions will be convened to:

- Optimize the working relationships between GPG and County staff in the identification, development, and submittal of high-impact grant applications;
- Upgrade the ability of County staff to conceptualize, develop, write, and produce proposal contents and procure grant funding; and
- Link the grant seeking process to departmental strategic planning.

1.3.1 **Clarification of Department and Consultant Roles**

In working with County staff, GPG will strive to maximize the input of County staff in proposal development, while minimizing to the extent desired the impact of proposal production on day-to-day workflows. However, particularly in the development of major technical proposals, there are key roles that must be played by County staff, and others where the GPG team can take the lead. Customized work plans will be developed for each proposal, detailing the sequence of tasks and the parties responsible.

1.3.2 **Proposal Development and Strategic Planning**

GPG will hold a minimum of two (2) group workshops for County department staff to develop across the board grant seeking techniques and link proposal development to departmental and multi-department strategic planning. As directed by the County, both workshops will include participation of key non-County collaborative partners including community-based organizations (CBOs), city agencies, and others. The workshops will:

- Provide a basis for linking fund development efforts to County and department strategic plans;
✓ Provide concrete tools for use in increasing the quality of funding proposals and development of high-impact financial development activities;
✓ Further develop the strength and quality of both internal and external linkages and collaboration relating to creative program and proposal development activities; and
✓ Provide an overview of the range and relevance of different prospect research and development techniques and tools for their direct incorporation into participants’ ongoing grant seeking activities.

An entry-level workshop (“Grant Seeking [and Obtaining!] Fundamentals) will be held to educate staff regarding the identification of RFP opportunities, evaluation of the potential match between funder and department need (including “go/no-go analysis”), and review of the basic ingredients of a well-written proposal. The proposal development and grant procurement process will be presented as a continuous process, involving all of the phases illustrated by the proposal development flow chart.

Through guided exercises grounded in real-life examples, participants will gain additional skills in:

✓ Development of the marketing concept as the key central organizing principle of a proposal;
✓ Bid/no-bid analysis, proposal anatomy, and proposal development timelines; and
✓ Crafting goals, objectives, and outcomes.

In the spring, the entry-level workshop will be repeated, or, based on work with department heads and designated staff, an advanced level workshop will be held for department and multi-department teams. The advanced workshop will assist teams to develop year-round plans for relationship development with funders, funder or program specific accountability/evaluation systems, proposal development calendars, and identification of research/assessment needs.

**Outcome/Product:** During ongoing work with department representatives, GPG staff will incorporate role clarification exercises and proposal development training as a feature of all proposal development activities. Two (2) training workshops will be held each year.

### 1.4 Comprehensive Proposal and Development Services

#### 1.4.1 Proposal Development Sequence

Following the bid/no-bid analysis and a decision to proceed, the GPG process for proposal development will generally involve the following key steps:

✓ Develop and submit for approval to the County Administrator’s Office (and relevant Department head as necessary) a cost estimate for the proposal development work. Work will proceed following approval by the County Administrator’s Office (and where necessary, the relevant Department Head(s)).
Strategy session with key department or program staff – Work Plan Development.

Concept paper and concept budget development. Sign-off by relevant County staff on program and budget concepts.

Iterative narrative and collateral material circulated to relevant staff.

Proposal Schedule. A planning tool that outlines document review, feedback, and turn-around time protocols for stakeholders in the grant proposal. The Proposal Schedule is informed by County staff availability, established during Step 1 - the strategy session.

Focused and facilitated meetings to review materials as needed at key junctures.

On-going web-based sharing of proposal and collateral materials for ease of access and communications.

Final sign-off and submission of proposal documents to funding agency.

Proposal follow-up activities.

1.4.2 Strategy Session(s) and Information Gathering/Proposal Work Plan
GPG work with Sonoma County staff on any particular grant application will be customized to best answer the RFP issued by the funding agency, and maximize the efficient use of County staff and expertise. After identifying a possible match between a County program and funding source and execution of the bid/no-bid analysis, the GPG will meet with the appropriate County staff person(s) to gather information about the proposed or existing project. This information can include written materials, web site sources, field visits to programs or sites, and conversations with experts from the County department. Following this preliminary strategy session, the GPG will prepare a work plan detailing the schedule and responsibilities for proposal production. At this stage, County staff responsible for developing or securing any needed materials are identified and notified of appropriate deadlines.

1.4.3 Concept Paper Development
Following the strategy session, GPG will write a concept paper, drawing on the program and service objectives of the County, and matching these needs to the funder’s stated goals. The concept paper is generally 2-3 pages and concisely captures the essence of the project including major partners, goals, outcomes, any specific requirements of the funder, and a summary budget.

GPG views the concept paper as a pivotal aspect of the proposal development process. The articulation of the concept paper is an interactive process, and its ultimate success depends on the input and serious editorial review of designated County staff. The concept paper summarizes the
key goals of the program and the budget amounts necessary to successfully implement and launch the project. It also details necessary commitments by County Departments in the form of matching requirements, staff time, reporting, and/or evaluation. To the extent that communication with project partners or supporters is a necessary part of the project, the concept paper becomes an invaluable communication tool, enabling stakeholders to quickly understand the essence of the proposed program.

1.4.4 Narrative and Collateral Material Development – Facilitated Review Sessions
The concept paper evolves into a proposal as the narrative expands, program goals are further defined, evaluation criteria are identified, and the budget is fine-tuned. Key attachments, letters of support, and other required materials are produced.

As necessary, GPG will facilitate focused meetings to review materials at key junctures that will generally involve at least two full drafts of the proposal. These meetings can be face-to-face, via conference call, electronic, or a combination. The goal of these meetings will be to:

- Sharpen the focus of the proposal;
- Assure that all relevant program and service data are included in the request;
- Verify that the budget line items match project needs and stated activities;
- Reflect in the proposal any recent changes in the County’s political, financial, physical, or service environment.

1.4.5 Online Access to Proposal Materials and Resources
If desired by County staff, GPG will establish a secure online sharing system for access to proposal materials. All materials developed for the County of Sonoma, including concept papers, proposal drafts, and proposal resources, will be posted, providing continuous access to this information.

1.4.6 Proposal Submission and Follow-Up
GPG will work with Sonoma County staff to develop appropriate follow-up strategies while proposals are pending, following award, or in the case that proposals are denied.

1.4.7 Other Projects
As directed by the County, GPG will work to support resource development projects beyond grant proposal development. This work could include analysis of potential private and public funding opportunities, development of pre-proposal and ancillary materials, and strategy development.

1.5 Pre-Proposal Development Services
As determined by the County, GPG will be available to assist with miscellaneous writing and research projects related to grant and contract procurement to include concept paper development, Letters of Intent/Inquiry, and specialized research. GPG will execute tasks as assigned in this area as specified under section 2.0 (b) of the “Agreement for Professional Services.”
1.6 Additional Tasks
The Glen Price Group will be available to work with County staff to leverage the County’s investment in proposals and related materials, by providing County staff with the graphics and materials utilized in proposals for use as:

- Power Point and multi-media presentations
- Publications
- Web pages

GPG will also make available through its Sonoma County Funding Opportunity News web site the results of research and information gathered during the proposal development and staff training process.

1.7 Measuring Success
GPG will provide monthly written reports, in a format approved by the County, that document all efforts undertaken in the previous month, including but not limited to: proposals in progress, cumulative grants submitted, cumulative grants awarded and their respective amounts, and staff training conducted. These reports will be submitted with GPG’s monthly invoice for services.

Additionally, status meetings will be scheduled, as deemed necessary, by the County or GPG.

GPG will work with County staff to measure the effectiveness of the staff training and grant writing services provided. Evaluation criteria will include but not be limited to:

- Increase in grant funding over prior periods;
- Increase in number of proposals submitted over prior periods; and
- Increase in County grant seeking capacity through improved staff capabilities and access to proposal development resources.

Outcome/Product: The primary outcome is the production of high-quality proposals that respond to defined County needs and secure grants. The proposal development process involves an accountability system for GPG and all participants, as defined by the agreed-upon work plan. For each proposal, a concept paper will be developed, defining key aspects of the project. Proposal development materials will be shared with relevant County staff through secure web-based file sharing systems.
2 Proposal and Hourly Pricing

The following table describes a framework for pricing individual proposal projects. Items affecting where a particular project will land on the scale include: degree of complexity, quality of existing material available, amount of original research work needed, amount of collaborative/partnership development required, and other factors.

<table>
<thead>
<tr>
<th>Proposal Type</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>$500 - $15,000</td>
</tr>
<tr>
<td>State of California</td>
<td>$5,000 - $20,000</td>
</tr>
<tr>
<td>Federal</td>
<td>$7,500 - $50,000</td>
</tr>
</tbody>
</table>

*The Glen Price Group (GPG) will set fixed-fee rates for proposal development subject to negotiation with the County of Sonoma based on the specific requirements and complexities of each project. Fixed-fee rate quotes cover all costs, including all personnel, materials, supplies, and travel except where specifically noted otherwise. For fixed-fee projects, GPG will typically invoice for 50% of the total fee at the initiation of work and 50% at the conclusion of the project.

For hourly agreements, GPG will invoice based on hours worked according to the rate for the position indicated on the chart below. Number of hours to be worked by position will be cleared prior to initiation of work.

<table>
<thead>
<tr>
<th>Position</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>$180</td>
</tr>
<tr>
<td>Vice President</td>
<td>$170</td>
</tr>
<tr>
<td>Senior Associate</td>
<td>$160</td>
</tr>
<tr>
<td>Associate</td>
<td>$125</td>
</tr>
<tr>
<td>Support Associate</td>
<td>$90</td>
</tr>
</tbody>
</table>

**The Glen Price Group invoices for hourly work once at the beginning of each month for work completed the previous month. Invoices include a brief description of the work performed, the date the work was executed, the number of hours dedicated to the work, and the name of the staff person who completed the work. An indirect cost fee of 10% is added to all hourly billings.