

**AGENCY RFP TRAINING:
FREQUENTLY ASKED QUESTIONS**

General

1. Q: Can an organization change the program(s) or certain aspects of the program(s) that they submitted an LOI for?
A: No, only those programs submitted in the LOI will be considered
2. Q: What if an organization still does not meet certain application standards (e.g. certification criteria; SSC), can they still submit an RFP?
A: Yes, however this will be taken into account when scoring the application
3. Q: How will the RFP be scored?
A: The RFP scoring criteria consists of the following: (1) Alignment and Contribution to Community Impact Agenda (2) Capacity and Sustainability of Organization (3) Effectiveness of Program Strategies (4) Measurement Process & Outcomes (5) Collaboration Efforts
4. Q: Who will be reviewing the RFPs?
A: Each application will be reviewed by five (5) individuals. Reviewers will include OCUW staff, community experts in Basic Needs, Education and Financial Stability, Corporate Partners and Key Donors
5. Q: Do agencies submitting a RFP have access to the scoring rubric?
A: No
6. Q: Will organizations previously funded by OCUW be given preference for funding?
A: No, this is a zero-based and open process
7. Q: Have the numbers or percentages that will be allocated to each priority been determined?
A: No, but as communicated previously, there will be an emphasis on Basic Needs
8. Q: If an agency wants to support the Self-Sufficiency Calculator but does not have the staff capacity, will other agencies be identified as a Self-Sufficiency Calculator resource?
A: No
9. Q: Will Self-Sufficiency Calculator trainings be offered for agencies that apply under Financial Stability and have not yet been trained? If so, when and where will these trainings be held?
A: Yes, OCUW is still in the process of planning next steps and determining a training schedule
10. Q: What if an organization does not have the staff or technological capacity to submit the RFP on-line?
A: The organization should ask their board for assistance
11. Q: Will OCUW be providing any technical assistance or resources during the RFP process?
A: Yes, for technical assistance during the RFP process, agencies can call (949) 477-4523 or email 2010LOI@unitedwayoc.org
12. Q: What are the expectations for reporting in this funding cycle?
A: Mid and Year End Reports will be required
13. Q: How will we report our outcomes?
A: This will be an online process and training will be provided

CTK

1. Q: If submitting a RFP for multiple programs, do you have to fill out multiple Primary Information forms?
A: No. Fill out only one (1) Primary Information form and fill out one (1) RFP form for **each program**.
2. Q: Can you cut and paste from MS Word to ensure that you do not exceed the maximum word count?
A: Yes, but all special characters must be removed
3. Q: Can more than one staff be in CTK at one time?
A: Yes
4. Q: Can organizations still view application and report forms in CTK from the previous funding cycle?
A: No, not at this time
5. Q: What if an organization doesn't remember their CTK password?
A: An organization can call (949) 477-4523 or email 2010LOI@unitedwayoc.org to request this information
6. Q: Will you get a confirmation that the application (RFP) has been submitted?
A: Yes
7. Q: Does an organization need to notify OCUW when they've submitted their RFP on-line?
A: No, when an RFP has been submitted, OCUW will receive an automated response from CTK

RFP

1. Q: What if a program has more than one area of focus area?
A: For the purposes of the OCUW RFP an agency will need to select one. An agency is recommended to select the area of focus and service that they will best be able to report on during the course of funding
2. Q: If an agency is collaborating with other organizations, but not all organizations receive funding for the program, should they be listed as collaborative partners in question # 14?
A: No. The partners not receiving funding should be addressed when answering question # 22
3. Q: Should the numbers provided in questions # 17 and #21 reflect program specific numbers or agency wide numbers?
A: All numbers provided should be **PROGRAM** specific
4. Q: How do agencies that provide services to homeless individuals/families, report on "cities served" in the RFP?
A: Report on the Orange County city that the individual/family is coming from. However, if a family/individual is coming from a city outside of Orange County include this information in the narrative **instead**
5. Q: If a program provides services to individuals in Orange County and Los Angeles County, should the Los Angeles County data be reflected in the RFP?
A: No. Report only on the Orange County data and make note of the Los Angeles data in the narrative
6. Q: What if an agency captures data on families rather than individuals?
A: The data will need to be broken out and reported as individuals
7. Q: What if the RFP submitted is for a new program and there are no current numbers to report?
A: Enter zeros for the current numbers

8. Q: How can an agency report on a fairly new program?
A: Report on the information that you have and provide an explanation as to why the numbers are low in the narrative
9. Q: What are some examples of program measurement tools?
A: Spreadsheets, information on tracking software; pre- and post- tests
10. Q: Can the measurement tool be more than one (1) page?
A: There is no page limit. However, you will only be allowed to upload one document and a PDF file is recommended
11. Q: Can a sample of an actual report be provided as the measurement tool?
A: Yes
12. Q: What if due to the length of the funding cycle, certain outcomes are unattainable?
A: The applicant will need to address this in question # 19 of the RFP
13. Q: Does a program applying under Basic Needs fill out the sections pertaining to Financial Stability and Education?
A: No. For question #21, only complete the section that applies to your primary area of focus. All other outcomes should be addressed in question #19.
14. Q: If a program addresses other areas, can you report on that information as well?
A: Yes, this can be addressed in the narrative
15. Q: Can the amount requested in the RFP differ from the amount requested in the LOI?
A: Yes, but you will need to review the limitations noted in the Funding Criteria document
16. Q: Should government funding also be listed as another funding source?
A: Yes
17. Q: If an agency conducts fundraisers for the program, do they need to predict the amount that will be raised?
A: Yes, include this in the narrative, not listed as a secured funding source
18. Q: Is there a specific format to use for the budget?
A: Agencies must submit a line-item budget for the program
19. Q: What if the program's current budget differs from that indicated in the LOI?
A: Submit the current budget
20. Q: Should the projected budget be based on a fiscal year?
A: The budget should reflect the time period that the program runs on whether it is calendar or fiscal year
21. Q: Should applicants list prospective funding for submitted program(s)?
A: Applicants should only list secured funding for submitted program(s)
22. Q: Will organizations need to fill out the Funding Criteria document again?
A: Yes and this document can be found in the CTK Library
23. Q: Does an agency need to fill out the Funding Criteria document for each program?
A: No. Each agency will only need to complete one (1) Funding Criteria document

24. Q: What if OCUW already has a copy on file of an applicant's most recent independent financial audit or review and management letter?
A: An agency will still need to submit a hard copy of their most recent independent financial audit or review and management letter
25. Q: How does an applicant know if they need to submit an independent financial audit or review or management letter?
A: Audits or financial reviews shall be submitted to OCUW based on total agency revenue according to the following guidelines:
1. **\$300,000 and Above**
One hard copy of an independent financial audit and a management letter are required to be submitted to OCUW by the reporting Certified Public Accountant (no electronic audits will be accepted). Please note, a management letter must be submitted to OCUW, regardless of whether or not any material weaknesses are found.
 2. **\$100,000 - \$300,000**
An independent financial review is acceptable, in lieu of an audit.
 3. **Less than \$100,000**
A compilation with full disclosures may be submitted in lieu of an independent financial audit or a financial review.
26. Q: If a part of a collaborative, do you need to submit an audit and management letter for each partner?
A: No. Only the lead agency will need to submit an audit and management letter (if applicable)
27. Q: Is there a preferred format for any of the information that is being requested as an upload (i.e. program's measurement tool, program budget, current board of director's roster and funding criteria)?
A: Yes, a PDF'd copy of the requested information is preferred