

CITY OF OAKLAND
AGENDA REPORT

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OFFICE OF THE CITY CLERK
OAKLAND

2003 OCT 16 PM 3:20

TO: Life Enrichment Committee
ATTN: Deborah Edgerly
FROM: Department of Human Services
DATE: October 28, 2003

RE: A REPORT AND REQUEST FOR APPROVAL OF THE OAKLAND FUND FOR CHILDREN AND YOUTH FISCAL YEAR 2004-2005 REQUEST FOR PROPOSALS AND FISCAL YEAR 2004-2005 AFTERSCHOOL INITIATIVE REQUEST FOR QUALIFICATIONS

SUMMARY

This report recommends approval of the Oakland Fund for Children and Youth (OFCY) funding processes and applications for services to be delivered during the fiscal year (FY) **2004-2005**. On October **7, 2003**, the Planning and Oversight Committee (POC) approved and recommended the release of the funding guidelines below:

- A Request for Proposals (RFP) for direct services aligned with OFCY Strategic Plan funding priorities is provided in Attachment A.
- A Request for Qualifications (RFQ) for direct services delivered under the Comprehensive School based Afterschool Initiative is provided in Attachment B.

Total funds available for services in **2004-2005** are expected to approximate **\$8.2** million. Both the RFP and RFQ are presented **as** drafts, and may be downloaded from the OFCY website at www.ofcy.org.

The OFCY **2002-2006** Strategic Plan identifies four funding categories as priorities for OFCY: Support for Children's Success in School, Child Health and Wellness, Healthy Transitions to Adulthood, and Youth Empowerment. OFCY's general RFP is for services under all four of the funding categories and specifies program priorities including prevention programs, programs using models of child or youth development, programs providing cost-effective services, afterschool programs, and collaborative programs. As a part of the RFP for funding, the POC has recommended that up to **\$1** million be made available to fund small and emerging organizations, defined **as** those with a total annual budget of less than \$375,000.

The OFCY Planning and Oversight Committee (POC) has recommended that **\$3** to **\$3.5** million be made available to fund an afterschool initiative **to** provide comprehensive afterschool activities and programs for children and youth in **high** need public schools. This funding is specifically made available for programs participating in the **21st** Century Community Learning Centers program or the After School Education and Safety Program.

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FISCAL IMPACT

The appropriation for the OFCY for FY 2003-2004 (for services to be provided in FY 2004-2005) totals approximately \$8.6 million (Fund 1780). After the authorized allocations for administration and evaluation, the total amount allocated from the budget appropriation for *grants* for direct services is approximately \$7.9 million (Fund 1780, Org. 90521, P22653). These funds were appropriated as part of the City's biennial budget process. **An** additional amount available for grants due to interest earned by the fund is estimated at \$250,000. There is no additional fiscal impact at this time. **An** additional appropriation for the interest earned will be requested at the time of Council approval of contracts.

BACKGROUND

OFCY was established in November 1996, when over three-fourths of the voters expressed a powerful commitment to children and youth by passing the Kids First! Initiative (Measure K). Measure K amends the City Charter, setting aside 2.5% of the City's unrestricted General Purpose Fund to support direct services to youth under 21 years of age.

OFCY has an initial twelve-year lifespan. OFCY's 19 member Planning and Oversight Committee (POC), composed of adults and youth appointed by the Mayor and City Council, is responsible for establishing funding guidelines and recommendations.

OFCY will release both the RFP and RFQ in November. Proposals are due in **January** 2004. The POC will request Council approval for a recommended funding package of grant contracts for 2004-2005 services in May 2004. **An** RFP life cycle chart is included as an attachment.

KEY ISSUES AND IMPACTS

OFCY's General RFP

Funding Categories

There are four funding categories for the general RFP that correspond to the OFCY 2002-2006 Strategic Plan.

1. Support for Children's Success in School - Children and youth will achieve improved educational outcomes, with an emphasis on early learning of children ages 0-5, and better educational outcomes for targeted grade populations of elementary and middle school-age children and youth. Programs funded in this category must demonstrate how they directly improve the educational outcomes and/or enhance cultural enrichment for their target population(s).

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2. Child Health and Wellness - Children and youth will make healthy choices regarding their mental, physical, sexual and spiritual health based on self-respect, and experience less violence in their personal lives. Programs funded in this category must demonstrate how they directly improve their target population's health and ability to make healthy choices regarding mental, physical, sexual, and spiritual well-being.

3. Healthy Transitions to Adulthood - Improvements are made to the life chances of youth who are in jeopardy of not making the transition to becoming well-balanced, healthy, productive, and honorable adults. The emphasis here is on high school age youth and youth ages 19 and 20. Programs funded in this category must demonstrate how they directly advance their target population's successful transition into becoming well-balanced, healthy, productive, and honorable adults.

4. Youth Empowerment - Youth are trained and prepared for and play key roles in meaningful partnerships that affect their lives. Programs funded in this category must demonstrate how they directly prepare and involve their target populations in leadership roles, decision-making capacities, partnerships, community building, and community development activities that are meaningful to themselves and to their peers. Youth-to-Youth Grantmaking programs will be funded within the Youth Empowerment Funding Category in accordance with the *OFCY 2002-2006 Strategic Plan*.

The RFP specifies priorities for funding to include: Prevention Programs, Program Using Models of Child and/or Youth Development Principles, Programs Providing Cost-Effective Services, Afterschool Programs, and Collaborative Programs. The total funds to be made available for services in 2004-2005 are expected to approximate \$8.2 million. Of this amount, \$669,136 will provide second year funding for grants initiated in FY03-04.

Small and Emerging Organizations

As a part of the RFP for funding, the POC has recommended that up to and no more than \$1 million be made available to fund small and emerging organizations, defined as those with a total annual budget of less than \$375,000. The small and emerging "set aside" was created to accomplish two objectives: (1) to preserve and to improve a balance within the OFCY portfolio of services by ensuring that an adequate number of programs exist to serve all geographic areas of the City of Oakland; and (2) to foster the development of new and innovative programs to fill potential service-gaps and special needs.

Two-Year Grants

Applicants requesting support from OFCY may submit proposals requesting a two-year period of support. Up to two million dollars (\$2M) of total funds granted through the 2003-2004 funding

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cycle will be available for two-year grants. Applicants requesting two-year support must demonstrate at least one of the following in their proposals:

- Applicant addressing a need in which little impact can be shown in a twelve-month period
- Applicant using innovative program design and implementation to address a critical community need

Two-year grants will be awarded at the discretion of OFCY. Proposals that demonstrate the above are not guaranteed two-year funding due to the limited availability of funds. In addition, OFCY is committed to a long-term investment in a network of services aimed at measurably improving the lives of children and youth. Decisions about two-year funding will be tied to this desire to have a long-term, positive impact on the lives of Oakland's children and youth.

Two-year grantees will receive an initial twelve-month contract for FY 2004-2005. A second twelve-month contract will be used with Council approval, if the grantee is meeting all deliverables and achieving outcomes at the mid-year point. Contract monitoring and evaluation data will be used to assess grantees' progress.

Comprehensive School based Afterschool Initiative – RFQ

The OFCY Planning and Oversight Committee (POC) has recommended that \$3 to \$3.5 million be made available for an Afterschool Initiative through a Request for Qualifications process. The Afterschool Initiative is consistent with the Strategic Plan funding category and priority "Support for Children's Success in School".

OFCY's primary interest is to fund programs providing comprehensive afterschool activities for children and youth in public schools. The programs and services must be provided at a public school that can provide a match with 21st Century Community Learning Centers or Afterschool Education and Safety Program (ASESP) funding to best maximize limited resources through coordination.

Comprehensive afterschool programs must include academic, recreation and enrichment components for no less than three hours a day at least 3-5 days per week. Comprehensive afterschool programs will include a wide range and choice of activities to include all three essential components of afterschool programming.

There **are** 32 school sites with 21st Century and 4 school sites with ASESP funding that are eligible for funding under the Initiative. The eligible sites include 12 middle schools and 24 elementary schools.

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- ⇒ Middle Schools: Programs must be offered a minimum of 3 days a week for at least 3 hours per day.
- ⇒ Elementary Schools: Programs must be offered a minimum of 5 days a week for at least 3 hours per day.

The RFQ solicits proposals that are collaborative, school based, and will provide comprehensive afterschool activities. The initiative places a strong emphasis on neighborhoods in Oakland that are underserved. To the extent possible, grants will be distributed geographically.

Through the Afterschool Initiative, grants will be awarded for 2 years to allow programs to develop, build capacity, and demonstrate impact on student achievement and program outcomes. The two-year grant will be renewable after the first year if programs demonstrate satisfactory evaluation and grant monitoring reports.

Key Funding Decisions

All eligible applicants, regardless of the size of the entity's current annual budget, may apply for OFCY general funds in 2004-2005. All organizations and agencies providing school based after school services and leveraging 21st Century funding or ASESP funding may apply to the Comprehensive School based Afterschool Initiative (RFQ) in 2004-2005.

The table below outlines the funding decisions reviewed and approved by the POC for inclusion in both the RFP and RFQ.

OFCY FY 2004-2005 Funding Overview

Funding Tier	Eligibility (Agency Budget)	Grant Amount Range	Two-Year Funding Eligible	Funds Available for Awards
RFP - Small and Emerging Organizations Fund	\$375,000 or Less	\$20,000 to \$75,000	✓	up to \$1,000,000
RFP - OFCY general funding (All organizations and agencies, regardless of budget size)	Single organizations and agencies	\$25,000 to \$175,000 for	✓	\$ 5,200,000*
	Youth-to Youth Grant making programs	\$25,000 to \$250,000	✓	
	Collaboratives	\$25,000 to \$300,000	✓	
Afterschool Initiative (RFQ)	All organizations and agencies that provide comprehensive, school based services and leverage 21 st Century or ASESP funding	Correlates to the number of youth and sites served	✓	\$3,000,000 – 3,500,000

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*Of this amount, \$669,316 is pre-allocated to second year funding for two-year grants (awarded for services which began in FY 2003-2004).

Minimum and Maximum Grant Awards

Requests for funding from the Small and Emerging Fund may range from \$20,000 to \$75,000. Requests for funding from OFCY general monies may range from \$25,000 to \$175,000 for single organizations or agency programs; from \$25,000 to \$250,000 for Youth-to-Youth Grantmaking programs; and from \$25,000 to \$300,000 for Collaborative programs.

Collaborative award maximums were increased from \$250,000 in the 2003-2004 funding cycle to \$300,000 for the 2004-2005 funding cycle for two reasons: (1) to soften the overall funding impact for successful programs coming off of second year funding from the previous two program years and (2) to recognize the need to fortify collaborations and partnership in light of the economic downturn.

PROJECT DESCRIPTION

Below is a table of tentative and proposed important dates and a proposed timeline for the RFP and RFQ processes.

Request for Proposals (RFP) Released	Friday, November 21, 2003
Bidders Conferences, Community Planning, and Technical Assistance Sessions	November 2003 –January 2004
Proposals Due	Friday, January 9, 2004
Application Review Comments Mailed to Applicants	Friday, March 7, 2004
Preliminary List of Programs Recommended for Funding Mailed to Applicants	Friday, March 7, 2004
Written Appeals from Applicants Due	Monday, March 22, 2004
Final List of Programs Recommended for Funding Mailed to Applicants	Friday, April 2, 2004

Bidders Conference

Two Bidders Conferences will be held immediately after the release of the RFP and RFQ. Prospective applicants will be oriented to the 2004-2005 RFP and RFQ processes and have an opportunity to ask general questions about eligibility criteria and funding availability.

Technical Assistance

Technical assistance by e-mail will be available for a total of seven weeks. Technical assistance will provide applicants with guidance regarding application requirements, correctly filling out required forms, and limited support with narrative elements of proposals.

Dissemination and Outreach

The 2004-2005 RFP and RFQ, as well as information about the Bidders Conference and available Technical Assistance sessions, will be disseminated throughout the communities of

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Oakland through several venues. A detailed dissemination and outreach plan is being crafted by OFCY to encourage potential service providers, including small and emerging organizations, to apply for OFCY funds. Venues for outreach and dissemination of the 2004-2005 RFP and RFQ will include, but not be limited to: direct outreach and mail to organizations and former grantees, print and broadcast public service announcements, and electronic media including e-mail and websites. Specific outlets will include, but not be limited to:

1. Oakland Tribune and Ethnic/Alternative print media outlets
2. OFCY Subscribers mailing list
3. City of Oakland Department mailing lists
4. East Bay Community Foundation mailing lists
5. Safe Passages mailing list
6. OFCY e-mail list
7. OFCY website
8. City of Oakland website
9. Alameda County Agency outlets

Additional venues and outlets are being determined to reach target audiences who are providing services to children and youth living in the City of Oakland. These target audiences include, but are not limited to:

1. Organizations serving multi-racial and multi-ethnic children and youth
2. Organizations in communities of faith serving children and youth
3. Organizations providing services near schools
4. City of Oakland agencies serving children and youth
5. Alameda County agencies serving children and youth

SUSTAINABLE OPPORTUNITIES

The award of OFCY grants funds will result in positive youth development outcomes, employment opportunities for youth and adults, and direct social benefits for the children and youth of Oakland.

DISABILITY AND SENIOR CITIZEN ACCESS

OFCY is committed to addressing issues of disability access and seeks technical assistance by working with the City's ADA Compliance Manager.

RECOMMENDATION(S) AND RATIONALE

Staff recommends approval of the FY2004-2005 Oakland Fund for Children and Youth Request for Proposals for direct services and the Request for Qualifications for the Comprehensive School Based Afterschool Initiative. Release of the RFP and RFQ will initiate an open and

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competitive review process for the award of OFCY grant funds to nonprofit entities and public agencies providing direct services for children and youth in Oakland.

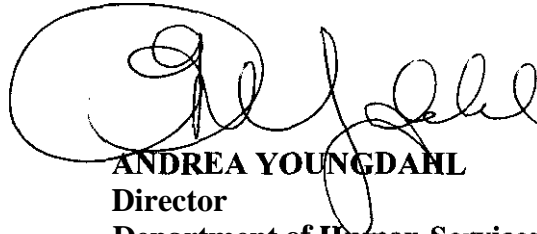
ALTERNATIVE RECOMMENDATION(S)

There is no alternative recommendation in this report. Measure K requires that OFCY funds be distributed through an open and competitive process.

ACTION REQUESTED OF THE CITY COUNCIL

Staff requests that the City Council approve the release of the proposed RFP for FY 2004-2005 services and the proposed RFQ for Comprehensive School based Afterschool Programs to be funded by the Oakland Fund for Children and Youth.

Respectfully submitted,



ANDREA YOUNGDAL
Director
Department of Human Services

Prepared by:
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HHS Program Planner

Reviewed by:
Sandra Taylor
Children and Youth Services Manager

APPROVED FOR FORWARDING TO THE
LIFE ENRICHMENT COMMITTEE:



Office of the City Manager

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RFP Lifecycle

RFP Development

OFCY Staff Drafts RFP
POC Approves RFP
City Council Approves RFP

August - November

Final Evaluation of Programs

RFP Released

Evaluator Writes Year-End Report
OFCY Staff Receives Report
POC Receives Report
City Council Reviews Report

July - September

Interim Evaluation of Programs

Bidders Conference
OFCY Staff Provides T.A.
Applicants Write Proposals

November - January

Applications Due

Evaluator Writes Interim Report
OFCY Staff Reviews Report
POC Receives Report
City Council Receives Report

December - February

OFCY Staff Sorts Applications
Review Committee Receives Applications

January

Grantees Run Programs

Applications Reviewed

Clients are Served
Grantees Participate in Evaluation
Evaluators Collect Data from Grantees

July - June (12 Months)

Review Committee Scores Applications
OFCY Staff Compiles Scores
OFCY Staff Assembles Recommendations

February

Recommendations Made

Contracts Executed

OFCY Staff **Make** Contracts with Grantees
Grantees Sign Contracts

OFCY Staff Compiles Recommendations
POC Discusses Recommendations
Applicants File **Appeals**
POC Considers Appeals

May - June

February - March

Recommendations Finalized

POC Approves Recommended Proposals
City Council Approves Recommendations

April - May

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Oakland Fund for Children and Youth

2004 – 2005 Request for Proposals

Proposals Due: Friday, January XX, 2004 – 5:00 p.m.

Oakland Fund for Children and Youth
150 Frank Ogawa Plaza, Suite 4216
Oakland, CA **94612**
(510) 238-6379
www.ofcy.org

ATTACHMENT A

DRAFT

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I. INTRODUCTION

OAKLAND FUND FOR CHILDREN AND YOUTH

The Oakland Fund for Children and Youth (OCFY) was established in November 1996, when over three-fourths of the voters expressed a powerful commitment to their children and youth by passing the Kids First! Initiative (Measure K). This initiative was the result of a grassroots effort including young people, parents, teachers, community organizers, staff from youth-serving organizations, and many others who were instrumental in placing the Measure K- Kids First! Initiative on the ballot. Measure K amends the City Charter, setting aside 2.5% of the City's unrestricted General Purpose Fund to support direct services to youth under 21 years of age. The 2.5% set aside is currently estimated to be between \$7.5 and \$8 million per year.

OFCY has an initial twelve-year lifespan. It is governed by a 19 member Planning and Oversight Committee (POC) that is composed of adults and youth appointed by the Mayor and City Council. OFCY is administered by the City of Oakland.

Each year, the POC develops a RFP and oversees a competitive granting process. This process results in funding recommendations that are presented to the City Council for its approval. In addition, the POC is responsible for producing an annual outcome evaluation of OFCY grantees, an annual process evaluation of the entire OFCY process, and every four years, a strategic plan outlining goals for OFCY. The POC meets regularly throughout the year to carry out this work. The grants awarded under this RFP will be part of OFCY's seventh funding cycle.

On October 23, 2001, City Council adopted the new **OFCY 2002-2006 Strategic Plan**. The **OFCY 2002-2006 Strategic Plan** may be downloaded from the Oakland Fund for Children and Youth website at www.ofcv.org. The long-range vision continues to embrace the beliefs that:

- ✓ Children and youth are integral members of our families and community, deserving of love, respect, and health
- ✓ Every young person should feel a sense of belonging
- ✓ Youth should walk into their futures with a strong belief in themselves, prepared to be responsible and self-sufficient adults

To achieve this vision, OFCY selected four funding priority areas for 2002-2006 for which achievable results have been identified. These priority areas are:

- ✓ Support for children's success in school, ages 0 to 13 years
- ✓ Child health and wellness, ages 0 to 13 years
- ✓ Healthy transition to adulthood, ages 14 to 20 years
- ✓ Youth empowerment, ages 11 to 20 years

11. IMPORTANT DATES

Request for Proposals (RFP) Released	Xxx , November xx , 2003 Check www.ofcv.org or call (510) 238-6379
Bidders Conference	December xx , 2003 TBA
Bidders Conference (Repeat Session)	December xx , 2003 TBA
Technical Assistance by E-mail Available	November xx , 2003 through January xx , 2004 (No E-mail T. A. between 12/23/03 and 01/04/04) mhart@oaklandnet.com
Technical Assistance Session #1	December xx , 2003 TBA
Technical Assistance Session #2	January xx , 2003 TBA
Technical Assistance by E-mail Ends	January xx , 2004 No e-mail responses after 12:00 p. m.
Proposals Due	January xx , 2004 5:00 p. m.
Application Scores and Application Review Comments Mailed to Applicants	March xx , 2004
Preliminary List of Programs Recommended for Funding Mailed to Applicants	March xx , 2004
Written Appeals from Applicants Due	March xx , 2004 5:00 p. m.
Final List of Programs Recommended for Funding Mailed to Applicants	April xx , 2004
Program Year Begins	July 1, 2004

Proposals received after 5:00 p.m. on **Xxx**, January **xx**, 2004 will not be considered for review. This deadline will be strictly enforced.

Appeals received after 5:00 p.m. on **Xxx** March **xx**, 2004 will not be considered for review. This deadline will be strictly enforced.

BIDDERS CONFERENCE

Bidders Conferences will be held on December xx, 2003 at a site to be announced and on December xx, 2003 at a site in the community. More information about the Bidders Conferences will be announced on the OFCY website, www.ofcy.org and on the OFCY general telephone line, (510) 238-6379 soon after the release of the RFP. Pre-registration is not required to attend the Bidders Conferences. OFCY staff will review the RFP funding guidelines and answer any questions that may arise. All potential applicants are encouraged to attend one of the Bidders Conferences.

TECHNICAL ASSISTANCE

Two Technical Assistance Sessions will be held. The dates for the Technical Assistance Sessions are December xx, 2003 and December xx, 2003. The Technical Assistance Sessions will be held at the **TBA**. More information will be announced on the OFCY website, www.ofcv.org and on the OFCY general telephone line, (510) 238-6379 approximately two weeks before the scheduled dates.

Technical Assistance by E-mail will be available between November xx, 2003 and January xx, 2004. For questions regarding the 2004-2005 RFP, e-mail: Maya R. Hart, OFCY Program Planner at mhart@oaklandnet.com. Please note that there will be no e-mail T.A. between December 23, 2003 and January 3, 2004.

APPEALS PROCESS

After the OFCY Planning and Oversight Committee (POC) has approved a set of preliminary funding recommendations, applicants will be notified about the appeals process. Any applicant may appeal. Appellants will be notified in writing regarding the success of their appeal. The POC may amend the preliminary funding recommendations if necessary to fund successful appellants, and may reduce the budgets of proposals recommended for funding in the initial set of funding recommendations. At the conclusion of the appeals process, the POC will submit final funding recommendations to the Oakland City Council. The City Council has the authority to either accept **or** reject the entire package of recommended agencies.

SITE VISITS

Site visits **or** other verification of experience as a service provider will be conducted as necessary before a final determination is made regarding grant awards. Site visits may be conducted at anytime before a contract is issued.

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III. ELIGIBILITY

A. APPLICANTS

1. The applicant must be either a public agency or a 501(c)(3) nonprofit organization.
2. Entities, other than public agencies, that do not have 501(c)(3) nonprofit status must be fiscally sponsored by a public agency or a 501(c)(3) nonprofit organization. In this case, the fiscal sponsor is the applicant. Fiscal sponsors would be the entity to contract with the City of Oakland should OFCY award a grant to the fiscally sponsored program. The City of Oakland would hold the fiscal sponsor as the official Contractor, which would be legally liable for all aspects of the contract including program implementation, fiscal management, and communication with the City of Oakland regarding subcontractor or fiscal partner activities. The fiscal sponsor would be expected and authorized to oversee and to manage all aspects of the contract including finances; to monitor and to implement program activities of subcontracting or partner agencies; to terminate contracts with subcontracting or fiscal partner agencies with the approval of the City of Oakland, if necessary; and to assume full fiscal responsibility of contract, subcontract, and fiscal partnership.
3. Public agencies may not use a fiscal sponsor and must serve as the applicant.
4. Entities that are 501(c)(3) nonprofit organizations may not use a fiscal sponsor and must serve as the applicant.
5. The applicant must have financial statements from the last two most recently completed fiscal years.
6. The applicant, if requesting more than \$75,000, must have a completed audit and independent auditor's report including cover letter and/or management letter on financial statements within the last three years. If the applicant is requesting \$75,000 or less and has an audit on financial statements within the last three years, that audit should be submitted.
7. The applicant, by submitting a proposal, authorizes OFCY to verify any and/or all information contained in the proposal.
8. OFCY has the right to disqualify applicants whose proposals provide false, inaccurate or incorrect information, or are incomplete in any fashion.

B. PROGRAM REQUIREMENTS

Eligible

1. The proposed program must provide direct services to children and youth, ages 0 to 20.
2. All of the children and youth served with OFCY funding and required match must live in, attend school in, or receive childcare services in Oakland. If matching funds exceed

25%, a proportionate number of children and youth from outside Oakland may be served in the program using those excess matching funds.

Ineligible

1. Any service that merely benefits children and youth incidentally
2. Acquisition of any capital item not for primary and direct use by children and youth.
3. Acquisition of, other than by lease for a term of 12 months or less, any real property.
4. Maintenance, utilities, or similar operating costs of a facility not used primarily and directly by children and youth (e.g., costs associated with an off-site office or location).
5. Any service for which a fixed or minimum level of expenditure is mandated by state or federal law, to the extent of the fixed or minimum level of expenditures.
6. OFCY does not wish to spend limited resources supplementing services provided by school funds.
7. Funding will not be provided for housing rent.
8. Funding will not be provided to pay for childcare slots.
9. Religious Prohibition – Funding will not be provided to pay for religious worship, instruction, or proselytization (recruiting someone to join one's religion or faith).

C. POST AWARD REQUIREMENTS

Award Amount

1. The amount an applicant requests may not necessarily be the amount awarded. The OFCY Planning and Oversight Committee (POC) is committed to funding applicants at a level that allows them to perform the proposed scope of services. However, the POC reserves the right to lower the funding amount **requested**. The POC also reserves the right to increase funding of a particular program if it believes there is a significant opportunity to enhance the evaluation potential, ability for replication, or other benefit to the children and youth of Oakland.
2. Grantees will be required to document matching funds. Proof of matching funds may be demonstrated in the following ways:
 - ✓ Copies of Letters of Support from foundations or private donors (on donor's letterhead), with a copy of any accompanying checks, bank statements, or payment schedules. Funds that are earmarked for other projects cannot be used as matches for OFCY-funded projects.

- ✓ Copies of Contracts or Service Agreements, with a copy of any accompanying checks, bank statements, or payment schedules. Funds that are earmarked for other projects cannot be used as matches for OFCY-funded projects.
 - ✓ In-kind support can be demonstrated with a letter (on donor's letterhead) documenting the monetary value of the in-kind donation. For example, if a donor provided space at no cost to a grantee, a donor's letter could document how much it would have cost the grantee to rent that space at market value. The in-kind donor cannot be the grantee.
 - ✓ Grantees using volunteers in direct service staff capacities must be able to demonstrate what that volunteer time would have cost for the nature of the volunteer service provided (i.e. spreadsheet documenting volunteer hours, volunteer sign-in sheets, etc.). Volunteers cannot be employed by a grantee's organization or be serving in a consultant or contractor capacity.
 - ✓ Grantees CANNOT use one OFCY grant as a match for other OFCY grants. For example, if a grantee has a \$150,000 grant with OFCY and is also a subcontractor on another OFCY grant for \$15,000, the subcontractor dollars cannot be used as a match on your \$150,000 grant. Further, a Collaborative cannot use an OFCY grant of one of its partners or subcontractors as a match.
3. OFCY and the City of Oakland have the right to modify the amount of funding awarded to a program in order to be consistent with the goals and guiding principles expressed in the *OFCY 2002-2006 Strategic Plan*. The *OFCY 2002-2006 Strategic Plan* may be downloaded from the Oakland Fund for Children and Youth website at www.ofcy.org.
 4. OFCY and the City of Oakland reserve the right, after a contract is awarded, to amend the resulting contract as needed throughout the term of the contract to best meet the needs of all parties.

Required Documents and Assurances

Applicants must be able and prepared to submit documents and assurances, including but not limited to:

- ✓ Signed Contract
- ✓ Contract Data Summary Sheet
- ✓ Revised Scope of Work & Budget, as necessary
- ✓ Declaration of Compliance with Living Wage -- the City of Oakland requires that any contractor receiving \$100,000 or more from the City of Oakland, must pay employees at least \$9.58 per hour with benefits and at least \$11.02 per hour without benefits. The living wage is adjusted regularly for cost of living increases; these amounts are likely to increase based on cost of living by the time the contracts begin.
- ✓ Compliance with Equal Benefits, Declaration of Nondiscrimination
- ✓ Campaign Contribution Form

- ✓ Insurance Certificate(s), endorsements, and waiver letters (if applicable)
- ✓ Independent Contractor Questionnaire
- ✓ Proof of 501(c)(3) status dated in the year **2001** or later
- ✓ Declaration of Corporate Status
- ✓ Business Tax Certificate
- ✓ Nuclear Free Zone Disclosure
- ✓ Declaration of Compliance with the ADA
- ✓ Applicants must comply with all existing local, state, and federal laws that prohibit discrimination based on race, color, national origin, age, gender, sexual orientation, or disability
- ✓ OFCY will provide any additional required forms to applicants selected for funding

Contract Negotiations

Scopes of work and budgets will be reviewed in detail and negotiated as necessary to ensure that they meet the goals, objectives and policies of OFCY. Therefore, during contract negotiation, scopes of work and budgets may be revised.

Contract Compliance

1. After final funding recommendations are made by the POC, prospective grantees will be required to submit program and financial reports to the OFCY office on OFCY designated forms, and living wage reports to the Contract Compliance Office. All reports must be submitted on the due dates specified. The grantee will be expected to maintain thorough records related to the contract including attendance sheets, receipts, and other back-up documentation for progress reports and invoices.
2. Grantees will be expected to provide the services projected in the proposal and scope of work, subject to contract negotiations. Failure to provide these services may result in reduced payments or suspension of payment.
3. All OFCY grantees are expected to provide evidence for in-kind and cash matches at the end of the third quarter. This can be in the form of letters, copies of checks, grants, or records of volunteer or donated services, as appropriate.
4. Budget Modifications -- Grantees may request up to *two* revisions to the contract budget during the contract year. Contract modifications cannot exceed the total amount of funding approved by City Council. All requests to modify the contract budget or contracted service level must be **APPROVED IN ADVANCE** of implementation. Approval is granted only when provided in writing by OFCY.

Evaluation

Grantees are required to participate fully in the OFCY evaluation process so that meaningful data may be gathered to report to all parties interested in OFCY. Participation in the OFCY

evaluation includes, but is not limited to attending trainings and workshops, gathering adequate data as determined by the evaluator on effort and results, and hosting site visits.

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IV. FUNDING AVAILABILITY

OFCY ~~has~~ approximately \$8.2 million available for funding 2004-2005 programs. About \$700,000 will fund the second year of two-year awards that were granted in 2003-2004 (last year). Therefore, approximately \$7.5 million will be available this year for new competitive awards. Up to one million dollars (\$1M) will be set aside to fund small and emerging organizations (see below) and approximately \$3.5 million will be available to fund the Afterschool Initiative.

Entities, whether as applicants or using fiscal sponsors as applicants, may apply to either the General Fund or to the Small and Emerging Organizations Fund, but may not apply to both, even if the proposals are substantially different. Entities can submit a separate proposal for their own program as well as be part of a collaborative proposed in another applicant's proposal to the General Fund, as long as the proposals are substantially different. That is, entities may not receive funds as a single agency and as part of a collaborative for the same program.

A. SMALL AND EMERGING ORGANIZATIONS FUND

OFCY recognizes that the RFP is much easier for larger, established agencies to navigate and complete. There are small and new organizations in Oakland that either do not apply or are not competitive because they lack the infrastructure to produce a strong application that is competitive with a larger organization. Further some small and new organizations attempt to propose programs that may be above their capacity, therefore setting them up to fail. The Small and Emerging Organizations Fund focuses on these smaller organizations and assists grass root organizations, faith-based organizations, and new agencies to be funded by OFCY.

Eligible entities can apply to this fund that has been set aside specifically for small and emerging organizations. Up to one million dollars (\$1M) have been set aside to foster the development of neighborhood and locally based services throughout the City of Oakland and to diversify the allocation of the funds available for competitive awards in 2004-2005.

Emerging organizations are organizations that have completed at least two years of service by the time of application to OFCY. The two years of services must be in the same program for which the organization is requesting OFCY support. Emerging organizations may also be those organizations that recently received their 501(c)(3) status, after having been fiscally sponsored by a public agency or a 501(c)(3) nonprofit organization. These organizations may have a longer track record (beyond two years) of providing services in the program for which OFCY support is requested.

Budget Requirements

The requesting entity's (not the fiscal sponsor's) current annual budget may not exceed \$375,000.

Request Size and Match Requirements

1. Requests for funding may not exceed 75% of the proposed program's cost. Proposals must demonstrate, and if awarded will be held accountable for, raising and documenting

the remaining 25% **or** more of the proposed program's cost. This minimum 25% match may be contributions of cash or in-kind services and must support the cost of the proposed program (see Post Award Requirements on **page 10** of this RFP).

Example: **An** entity with an annual budget of \$350,000 is seeking funds from OFCY to run an after-school program that costs \$60,000 per year. This entity would be able to request a maximum of 75% of the program cost, which is \$45,000, from OFCY. The entity, if awarded a grant from OFCY, would be held accountable for raising a minimum of \$15,000 to run the program.

2. No more than 10% of the total amount requested from OFCY may be used for indirect costs. Using the above example, no more than \$4,500 of the \$45,000 may be used for indirect costs.
3. Requests for funding must be at least \$20,000 and must not exceed \$75,000.

Number of Applications

1. Entities, whether requesting funds as the applicant or using a fiscal sponsor as the applicant, may not submit more than one application to the Small and Emerging Organizations Fund, even if the proposals are substantially different.
2. Entities can submit a separate proposal for their own program as well as be part of a collaborative proposed in another applicant's proposal to the General Fund, **as** long as the proposals are substantially different. That is, entities may not receive funds as a single agency and as part of a collaborative for the same program.

An applicant, whose program is already supported by OFCY two-year funding, while in the first year of funding, may not apply for OFCY support of that same program.

B. GENERAL FUND

All eligible applicants, regardless of the size of the entity's current annual budget, may apply to the OFCY General Fund in 2004-2005.

Request Size and Match Requirements

All proposals submitted to the OFCY General Fund must meet the following requirements:

1. Requests for funding may not exceed 75% of the proposed program's cost. Proposals must demonstrate, and if awarded will be held accountable for, raising and documenting the remaining 25% or more of the proposed program's cost. This minimum 25% match may be contributions of cash or in-kind services and must support the cost of the proposed program (see Post Award Requirements on page 8 of this RFP).
2. For Collaborative Programs, no more than 15% of the total amount requested from OFCY may be for indirect costs. For a definition of Collaborative Programs, see **page 16** of this RFP.

3. For all other programs, no more than 10% of the total amount requested from OFCY may be for indirect costs.
4. For Youth-to-Youth Grantmaking programs, funding requests must be at least \$25,000 and cannot exceed \$250,000.
5. For Collaborative Programs, funding requests must be at least \$25,000 and cannot exceed \$300,000.
6. All other funding requests, whether the entity requesting funds is the applicant or using a fiscal sponsor as the applicant, must be at least \$25,000 and cannot exceed \$175,000.

Number of Applications

1. Funding requests of the entity or lead entity of a collaborative, whether the entity requesting funds is the applicant or using a fiscal sponsor as the applicant, may submit more than one application to the OFCY General Fund as long as the proposals are substantially different. Entities may not submit the same proposal to different Funding Categories (see **page 19** of this RFP).
2. Entities can submit a separate proposal for their own program as well as be part of a collaborative's proposal, as long as the proposals are substantially different. That is, entities may not receive funds as a single agency and as part of a collaborative for the same program.

An applicant, whose program is already supported by OFCY two-year funding, while in the first year of funding, may not apply for OFCY support of the same program.

Collaborative Programs

OFCY encourages collaboration among entities when appropriate, feasible, and the opportunity for success is enhanced. A collaborative must consist of three or more substantially participating agencies working together toward a mutual goal, and at least two agencies are proposed to receive OFCY funds. The collaborative must have already secured funding that will be supplemented with OFCY funding. OFCY strongly encourages collaboration between private nonprofit and public entities to create and/or to strengthen linkages that maximize the cost-effectiveness and quality of service delivery. Collaborative proposals should explain the rationale for this approach and describe the roles and responsibilities of each partner. As stated above, multi-agency applicants may apply for up to \$250,000.

C. PERIOD OF SUPPORT

One-Year Grants

Contracts will be issued to selected applicants for a twelve-month period of services to be provided between July 1, 2004 and June 30, 2005. The grant period will begin on July 1, 2004 if the Oakland City Council has approved all of the recommended applicants by that date. The grant period will end on June 30, 2005.

Selected applicants will not receive their first disbursement of funds until all required contract documents are submitted and their contract is signed. If grantees are prompt in submitting contract documents, they can anticipate an initial disbursement in August 2004.

Two-Year Grants

Applicants requesting support from either the Small and Emerging Organizations Fund or the General Fund may submit proposals requesting a two-year period of support. Up to 2 million dollars (\$2M) of total funds granted through the 2004-2005 RFP process will be available for two-year grants. Any amount not funded through 2-year grants will be awarded to 1-year grants. Applicants requesting two-year support must demonstrate the following in their proposals:

At minimum:

- ✓ Satisfactory evaluation and grant monitoring reports
- ✓ Demonstrated track record as an established OFCY program
- ✓ Ability to make a compelling argument based on the criteria below.
 - Applicant addressing a need in which little impact can be shown in a twelve-month period
 - Applicant using innovative program design and implementation to address a critical community need

Two-year grants will be awarded at the discretion of OFCY. Proposals that demonstrate the above are not guaranteed two-year funding due to the limited availability of funds. In addition, OFCY is committed to a long-term investment in a network of services aimed at measurably improving the lives of children and youth in Oakland. Decisions about two-year funding will be tied to this desire to have a long-term, positive impact on the lives of Oakland's children and youth.

Programs already supported by OFCY two-year funding, while in their first year of funding, may apply to OFCY to fund that same program.

Two-year grants that result from this RFP will be awarded for 2 twelve-month periods. The first twelve-month period will run from July 1, 2004 to June 30, 2005, provided the City Council has approved funding recommendations by July 1, 2005. The second twelve-month period will run from July 1, 2005 to June 30, 2006 and will be contingent upon successful performance during the first twelve-month period.

Grantees will not receive their first disbursement of funds until they submit required contract documents and their contract is signed. If grantees are prompt in submitting contract documents, they can anticipate an initial disbursement in late August 2004.

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V. FUNDING CATEGORIES

This section describes the categories of services that will be funded under this RFP. There are four categories in the *OFCY 2002-2006 Strategic Plan* for which proposals are being invited. OFCY is interested in funding these categories to achieve the goals and objectives of the *OFCY 2002-2006 Strategic Plan*. Applicants should thoroughly review the categories described below. A full discussion of these categories as well as the outreach, youth involvement, and youth leadership guidelines to which programs funded under these categories must adhere is contained in the *OFCY 2002-2006 Strategic Plan*. The *OFCY 2002-2006 Strategic Plan* may be downloaded from the Oakland Fund for Children and Youth website at www.ofcv.org.

There are four categories of service that OFCY will fund. Each category targets a specific range of ages and population(s). Each category also describes strategies for serving them. Applications must demonstrate adherence to these targets as well as the service strategies.

Applicants must clearly identify one funding category through which support is sought, the target population(s) that will be served, and the strategy or strategies that will be used to serve the target population(s). Applicants must select one and only one funding category. Should programs cut across multiple categories, applicants should choose the category that best describes the majority of a program's target population(s) and strategies to be used. Although applicants must select a single funding category through which to seek support, applicants may describe how their programs benefit the target populations identified in other funding categories when relevant (see Units of Service per Funding Category on **page 43** and Attachment A, Scope of Work Form on **page 58** of this RFP).

A. SUPPORT FOR CHILDREN'S SUCCESS IN SCHOOL

Target Age Range:

- ✓ 0-13 years

Target Populations:

- ✓ Early childhood (ages 0-5 years)
- ✓ Elementary school-age children and middle school-age youth (ages 5-13 years)

Objective:

Children and youth will achieve improved educational outcomes, with an emphasis on early learning of children ages 0-5, and better educational outcomes for targeted grade populations of elementary and middle school-age children and youth.

Programs funded in this category must demonstrate how they directly improve the educational outcomes and/or enhance cultural enrichment for their target population(s).

Strategies:

- ✓ Programs designed to prepare children ages 0-5 years for elementary school
- ✓ Programs designed to improve the academic performance of and/or to enrich the cultural/artistic knowledge of elementary and middle school students ages 5-13 years, particularly for those whose academic performance is poor or below average

Programs may include, but are not limited to:

- ✓ Programs that support early childhood development in reading and other learning activities in preparation for Kindergarten
- ✓ After-school programs that provide mentors and tutors in cultural and/or traditional academic subjects
- ✓ School-linked programs (documented partnerships or collaborations between community organizations and schools) that provide mentors and tutors in cultural and/or traditional academic subjects

B. CHILD HEALTH AND WELLNESS

Target Age Range:

- ✓ 0-13 years

Target Populations:

- ✓ Early childhood (ages 0-5 years)
- ✓ Elementary school-age children and middle school-age youth (ages 5-13 years)

Objective:

Children and youth will make healthy choices regarding their mental, physical, sexual and spiritual health based on self-respect, and experience less violence in their personal lives.

Programs funded in this category must demonstrate how they directly improve their target population’s health and ability to make healthy choices regarding mental, physical, sexual, and spiritual well-being.

Strategies:

- ✓ Programs designed to improve the health and well-being of children ages 0-5 years
- ✓ Programs designed to improve the health and well-being of elementary and middle school children ages 5-13 years

- ✓ Programs designed to build healthy choice-making skills of elementary and middle school children ages 5-13 years regarding mental, physical, sexual, and spiritual well-being

Programs may include, but are not limited to:

- ✓ After-school programs that build violence prevention, conflict resolution, and mediation skills
- ✓ School-linked programs (documented partnerships or collaborations between community organizations and schools) that build violence prevention, conflict resolution, and mediation skills
- ✓ Direct and supportive services such as health education, case management, counseling, mentoring, drop-in centers, and “safe-spaces” for socializing and group activities
- ✓ School or community-based clinics that offer preventive health care, mental health services, and social services to children and their families and caregivers

C. HEALTHY TRANSITIONS TO ADULTHOOD

Target Age Range:

- ✓ Ages 14-20 years, regardless of high school matriculation or graduation status

Target Populations:

- ✓ High school-age youth (ages 14-18 years)
- ✓ Post-high school age youth (ages 19-20 years)

Objective:

Improvements are made to the life chances of youth who are in jeopardy of not making the transition to becoming well-balanced, healthy productive, honorable adults. The emphasis here is on high school age youth and youth ages 19 and 20.

Programs funded in this category must demonstrate how they directly advance their target population’s successful transition into becoming well-balanced, healthy, productive, and honorable adults.

Strategies:

- ✓ Programs designed to improve the health of youth ages 14-20 years
- ✓ Programs designed to build healthy choice-making skills of youth ages 14-20 years regarding mental, physical, sexual, and spiritual well-being

- ✓ Programs designed to build life-skills through continued education, vocational training, community-building, and civic participation particularly for below-average performing students and those who have or are at risk of dropping out of school

Programs may include, but are not limited to:

- ✓ School-linked (documented partnerships or collaborations between community-organizations and schools), school-based, or community-based programs that build violence prevention, conflict resolution, and mediation skills
- ✓ Programs that support high school matriculation or re-entry, preparation for GED, vocational training, and preparation for post-secondary education
- ✓ Direct and supportive services such as health education, case management, counseling, mentoring, building independent living skills, and creating “safe spaces” for socializing and group activities

D. YOUTH EMPOWERMENT

Target Age Range:

- ✓ Ages 11-20 years

Target Populations:

- ✓ Middle school-age youth and high school-age youth (ages 11-18)
- ✓ Post-high school-age youth (ages 19-20)

Objective:

Youth are trained and prepared for and play key roles in meaningful partnerships that affect their lives.

Programs funded in this category must demonstrate how they directly prepare and involve their target populations in leadership roles, decision-making capacities, partnerships, community building, and community development activities that are meaningful to themselves and to their peers.

Strategies:

- ✓ Programs designed to foster and support initiatives and activities lead by youth ages 11-20 years that benefit themselves, their peers, and their communities
- ✓ Programs designed to promote training and awareness of issues and concerns of youth ages 11-20 years

Programs may include, but are not limited to:

- ✓ Youth-to-Youth Grantmaking programs and activities that train youth to be responsible grantmakers in any of the following areas: (1) Support for Children’s Success in School, (2) Child Health and Wellness, and (3) Healthy Transitions to Adulthood (see Youth-to-Youth Grantmaking below).
- ✓ Peer education, training, and support programs designed and led by youth
- ✓ Programs designed to build youth skills in advocacy, policy, or leadership
- ✓ Youth centers with visions and programs that are created, managed, and evaluated by youth

Youth-to-Youth Grantmaking

These programs train youth to be responsible grantmakers to other youth-initiated and youth-led programs. Applicants seeking OFCY funding for Youth-to-Youth Grantmaking programs must sub-grant these funds to other youth-initiated and youth-led programs with adult sponsors who have applied to be a sub-grantee of the applicant’s program. The following funding policies apply to Youth-to-Youth Grantmaking program applicants:

1. Sub-grants given to youth must advance the goals stated under the three other priority areas in the **OFCY 2002-2006 Strategic Plan**: Support for Children’s Success in School, Child Health and Wellness and Healthy Transitions to Adulthood. The **OFCY 2002-2006 Strategic Plan** may be downloaded from the Oakland Fund for Children and Youth website at www.ofcv.org.
2. The direct program costs such as staffing, youth grant maker and youth applicant recruitment may not exceed 30% of the total amount requested.
3. No more than 10% of the amount requested can be for indirect costs.
4. At least 60% of the amount requested must be available to distribute as direct sub-grants grants to youth-initiated and youth-led programs.
5. OFCY encourages a wide distribution of youth-to-youth sub-grants throughout Oakland, rather than focusing in a few neighborhoods.
6. Applicants seeking OFCY support for Youth-to-Youth Grantmaking programs must demonstrate capacity to recruit, train, and support youth as grantmakers as well as sub-grantees.
7. Applicants seeking OFCY support for Youth-to-Youth Grantmaking programs must also demonstrate a plan to provide an appropriate level of support and oversight of the youth engaged in the grantmaking program, and to ensure the grantmaking program is implemented and funds are used for their intended purpose.

VI. OFCY PROGRAM PRIORITIES

When developing proposals for this RFP, applicants should be aware that OFCY has set a priority to fund specific types of programs:

A. AFTER-SCHOOL PROGRAMS

For school-aged children and youth, our primary interest is to fund programs providing services after-school until early evening (approximately 2- 8 p.m.). Programs are to include academic, recreation and enrichment activities two to three hours daily at least **3** times a week.

This policy is rooted in the knowledge that more than 75% of Oakland's children and youth do not have access to after-school programs, and that youth at-risk behavior can increase dramatically in after-school hours. Programs are encouraged to offer services later into the evening, on weekends, during the summer, or other times when school is not in session, if these services are an extension of the after-school program.

For the purposes of this RFP, OFCY has recognized four categories of after-school programs:

- ✓ Comprehensive – wide range and choice of activities (academic support, enrichment, recreation, etc.); all those in attendance participate in a variety of activities; usually offered daily for more than 2 hours/day; has registered, regular participation
- ✓ Academic support – homework assistance, tutoring, literacy and related academic support; can include registered and/or drop-in participants
- ✓ Enrichment programs – classes, clubs and drop-in programs; wide variety of enrichment activities (arts, culture, recreation, etc.); participation is on a limited or ad hoc basis; can include registered and/or drop-in participants
- ✓ Recreation – sports and games; can include registered and/or drop-in participants

While OFCY wants to support efforts to expand access for Oakland's children and youth to comprehensive after-school programs, entities providing services that fall into the other three categories of after-school programs are encouraged to apply for funding.

Any proposed programs that is not eligible for funding under the Afterschool Initiative RFQ is eligible to apply under this category in this RFP.

Any proposed programs working in collaboration with public schools or other public agencies/departments are required to submit letters of agreement (Attachment K) as described on **page 46** of this RFP.

B. PREVENTION PROGRAMS

Priority will be given to programs with a prevention focus that promote the health and welfare of children and youth.

C. PROGRAMS USING MODELS OF CHILD AND/OR YOUTH DEVELOPMENT PRINCIPLES

Priority will be given to programs that demonstrate use of model child or youth development principles. Visit the OFCY website, www.ofcy.org, for references.

D. PROGRAMS PROVIDING COST-EFFECTIVE SERVICES

Priority will also be given to programs that provide cost-effective, quality, substantive services to participants and/or the greatest number of participants. Please be realistic in your estimates of the number of participants to be served. Programs falling significantly short of targets may receive reduced funding. Two primary factors will be considered by OFCY:

1. The proposed program demonstrates adequate overall cost per unit of service in relation to the units of service provided.
2. The proposed program demonstrates that cost per unit of service is competitive with the cost of similar services available from other service providers.

E. COLLABORATIVE PROGRAMS

OFCY encourages collaboration among entities when appropriate, feasible, and the opportunity for success is enhanced. A collaborative must consist of three or more substantially participating agencies working together toward a mutual goal, and at least two agencies are proposed to receive OFCY funds. The collaborative must have already secured funding that will be supplemented with OFCY funding. OFCY strongly encourages collaboration between private nonprofit and public entities to create and/or to strengthen linkages that maximize the cost-effectiveness and quality of service delivery. Collaborative proposals should explain the rationale for this approach and describe the roles and responsibilities of each partner.

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VII. REQUIRED PROGRAM COMPONENTS

OFCY has identified the following four components that are mandatory for any program funded by OFCY. Applications that clearly and explicitly demonstrate, as well as provide evidence of incorporating all of the required program components, will be viewed more favorably by OFCY than those that poorly demonstrate or incorporate fewer than all of the required program components:

- A. Keeping Kids Safe
- B. Parent/Caregiver and Youth Involvement
- C. Connections to Caring Adults
- D. Community Benefit and Enrichment

A. KEEPING KIDS SAFE

Safe, supportive environments are necessary to help children make a successful transition to adolescence and adulthood. Keeping kids safe is defined broadly for the purposes of this RFP and includes both physical safety (e.g., preventing physical violence against young children and youth) and emotional safety (e.g., preventing harassment based on sexual orientation, gender, cultural identity, or physical disability).

The following applies to programs in all Funding Categories:

1. There are established systems for tracking youth and others while on site
2. There is a youth/adult ratio that ensures adequate supervision
3. There is a site security plan for handling emergency situations

Strategies may include, but are not limited to:

- ✓ Developing and using clearly understandable rules of conduct (addressing both physical and emotional safety)
- ✓ Providing staff training on safety issues
- ✓ Addressing the need to keep participants safe as they come to or leave the program
- ✓ Collaborating with other neighborhood resources to increase the safety of children and youth
- ✓ Creating environments where youth feel safe to discuss issues that concern them

B. PARENT/CAREGIVER AND YOUTH INVOLVEMENT

A cornerstone of OFCY's legislation and vision is to engage parents and guardians of young children, and youth themselves in all elements of programming. We consider this focus on youth involvement in programming a leadership development opportunity.

The following applies to programs in all Funding Categories:

1. There are opportunities for parent, guardians, and youth to be involved in program design, implementation, and evaluation. Youth involvement should be age appropriate.

Strategies may include, but are not limited to:

- ✓ Activities that facilitate parent/caregiver and youth involvement through participation on boards, councils, committees, governing positions
- ✓ Youth taking an active and age appropriate role in program development as well as program and agency evaluation, and providing input on a regular basis through surveys, facilitated discussions, focus groups, and advisory groups

C. CONNECTIONS TO CARING ADULTS

Relationships with caring adults are one of the most critical factors in the healthy development of children and youth. For the purposes of this RFP, caring adults will be defined as those who serve as advocates for youth, help youth overcome their challenges, and help youth access support and resources.

The following applies to programs in all Funding Categories:

1. There is an appropriate participant/adult ratio. Enough adults should be involved to ensure that every young person can receive some personalized attention.
2. There is sufficient time spent in relationships. Consistent and regular contact is necessary to develop a trusting relationship with an adult.
3. There are adults involved who can relate to children and youth. Ethnic/cultural background, professional qualifications, and life experience should indicate their potential for relating effectively to children or youth.

The following applies to all programs serving children ages 0-5 years:

Programs serving children ages 0-5 years must demonstrate at least one of the following:

1. How the program fosters relationships between young children and caring adults that did not exist prior to the program
2. There is a plan for improving the ability of adults in the child's life (parents or caregivers) to care for their children well, through family support models

D. COMMUNITY BENEFIT AND ENRICHMENT

Civic participation and community service are important elements of healthy youth development. OFCY defines civic participation and community service broadly to include any activities that benefit others and enable young people to gain a sense of their importance in the life and health of the community.

The following applies to programs in all Funding Categories, serving children over the age of 5 years:

1. The program provides developmentally appropriate opportunities for participants “to give back” to the community by providing services to the community (such as with seniors, neighborhood improvement, etc.)

Strategies may include, but are not limited to:

- ✓ Encouraging young people to develop empathy for others
- ✓ Providing community service opportunities that allow young people to use skills or knowledge gained from the program

Please note: Programs that serve children ages 0 to 5 years are not required to demonstrate incorporation of the Community Benefit and Enrichment Program Component.

VIII. FORMATTING REQUIREMENTS

A. ELEMENTS OF A COMPLETE PROPOSAL

Complete proposals will contain the items in the checklist below. Elements must be presented in the order of the checklist. Any application that does not include all items in the checklist below will be considered incomplete. Incomplete proposals will not be considered for funding and the applicant will be notified. Only the requested elements will be reviewed. Do not submit additional attachments. They will not be considered. If applying for a two-year grant, two versions of Attachments A, B, C, D, and E must be submitted – one for FY 04-05 and one for FY 05-06.

- **10 Copies of Complete Proposals.**
 - Proposals must be single sided – DO NOT PRINT PROPOSALS DOUBLE-SIDED
 - Proposals must be clipped or stapled – DO NOT SPIRAL BIND PROPOSALS
 - Proposals must contain the following:
 - Proposal Cover Sheet
 - Proposal Narrative
 - Not to exceed 14 Pages (20 Pages for Collaborative Proposals)
 - Double spaced print using standard 12 point font and 1 inch margins
 - Attachment A – Scope of Work
 - **Attachment B – Listing of Activity Locations and Contacts**
 - Attachment C – Summary Budget Form
 - Attachment D – Lead Agency Budget Form
 - Attachment E – Subcontractor Budget Form (for each partner, if applicable)
 - Attachment F – Budget Narrative (for each partner, if applicable)
 - Attachment G – Overall Agency Budget
 - Attachment H – Resume/Job Description for Key Staff
 - Attachment I – Demographics Form
 - Attachment J – Organizational Chart and Board Roster
 - Attachment K – Letters of Agreement
 - Attachment L – Memorandum of Understanding – Fiscal Sponsor (if applicable)
 - Attachment M – Two Most Recently Completed Years of Financial Statements to include:
 - Balance Sheet (Statement of Financial Position)
 - Profit and Loss (Statement of Income)
 - Cash Flow Statement
 - Statement of Functional Expenses

- Attachment N – Audit Report with Cover and/or Management Letter (if request exceeds \$75,000) – Not Applicable to Public Agencies
- Attachment O – Copy of IRS Letter Certifying Tax Exempt Status dated in the year **2001** or later

B. FORMATTING REQUIREMENTS

All proposals must adhere to the following formatting requirements. Proposals that do not adhere to the following formatting requirements will not be considered.

1. All grant proposal narratives and attachments must be type written on 8-1/2 x 11-inch paper, using double spacing and 1-inch margins on all sides. All text must be double-spaced including charts and tables. Please use a standard 12-point typeface such as Times New Roman font. Do not print pages double-sided.
2. All pages in the Proposal Narrative must have the following header:

Name of Lead Agency	Project Title	Page # of # (Total Pages)
Top Left	Top Center	Top Right
3. All pages in the Proposal Narrative must be numbered consecutively. Proposal Narratives may not exceed 14 pages double-spaced (excluding cover sheet, required attachments, and application forms). Proposal Narratives of Collaborative Programs may not exceed 20 pages double-spaced (excluding cover sheet, required attachments, and application forms). Proposal Narratives should only use the total number of pages absolutely necessary. Proposals will not be penalized for using less than the maximum number of pages allowed.
4. All pages of all attachments should have the lead agency's name at the top. Attachments should be labeled and pages numbered if they have multiple pages.

C. SUBMITTAL REQUIREMENTS

1. Applicants must submit (10) ten bound (with a heavy clasp is preferred) or stapled copies of their proposals. **DO NOT SPIRAL BIND PROPOSALS.**
2. All proposals must be hand delivered, complete, to offices of the Oakland Fund for Children and Youth on the 4th floor, Suite 4216 of the Lionel J. Wilson building at 150 Frank H. Ogawa Plaza (across from City Hall).
3. Proposals must be delivered **NO LATER THAN 5:00 p.m., Friday, January xx, 2004.** Late applications will not be accepted and will not be eligible for funding.
4. Postal mailed, e-mailed, and faxed proposals will not be accepted.

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IX. PROPOSAL NARRATIVE

Each element of the Proposal Narrative must be presented in the order below. Proposal Narratives will be reviewed and scored based upon the adequacy and thoroughness of the response to the RFP requirements. The relative importance of the evaluation criteria are provided below as a guide to help you write your proposal:

<u>Narrative Element</u>	<u>Points</u>
Demonstration of Need	10
Agency History and Capacity	20
Staffing and Staff/Consultant Qualifications	10
Program Design	35
Outcomes and Evaluation	15
Required Resources and Budget Request	10
TOTAL	100

Use the following elements to prepare a Proposal Narrative, which must adhere to the formatting requirements described on **page 30** of this RFP.

A. DEMONSTRATION OF NEED (10 POINTS)

1. Briefly describe the community you are working in and the characteristics of the youth who will participate in the proposed program. (This should summarize the information in Attachment I - Demographics Form.)
2. Describe the need you are addressing and provide local or other data to show the magnitude of the need/issue
3. How were these needs identified? Tie the need/issue to the RFP Funding Category under which you are applying.

EXPLAIN WHY THE PROJECT IS NEEDED (E.G., WHAT ARE THE DEFICIENCIES, GAPS, AND OTHER FACTORS THAT SHOW EVIDENCE OF THE NEED FOR THIS PARTICULAR PROJECT?). DESCRIBE WHY THE PROPOSED APPROACH IS AN APPROPRIATE ONE TO RESPOND TO THE NEED/ISSUE OR THE POPULATION YOU WISH TO SERVE.

Demonstration of Need will be scored during the review process using the following criteria:

- ✓ How well the information in Attachment I is summarized.
- ✓ To what extent do the data support the magnitude of the need/issue and justify the need for the project and the proposed approach?
- ✓ To what extent does the need/issue described address the *OFCY 2002-2006 Strategic Plan's* priorities (results) for the funding category?

- ✓ To what extent is there evidence of the need for the proposed project for the affected target group(s)?

B. AGENCY HISTORY AND CAPACITY (20 POINTS)

All applicants must answer questions 1-8.

Proposals using a Fiscal Sponsor should answer questions 1-7 from the perspective of the sponsored entity, not from the perspective of the Fiscal Sponsor. Question 8 should be answered from the perspective of the Fiscal Sponsor and the sponsored entity.

If applying as a Collaborative Program, answer questions 1-7 from the perspective of each organization and/or agency in the collaborative and question 8 from the perspective of the lead agency.

1. Describe the organization(s) applying for funds, including history, mission, and types of services provided by the organization(s). How does your mission fit with the mission and goals of OFCY?
2. Describe the ways in which the Board of Directors represents the communities of the children and youth being served. Also describe the ways in which the Board and the organization solicit and utilize community feedback about programs.
3. Describe similar current or past projects or services or accomplishments that relate to the type of work required under this RFP. What was the size or scope of those efforts? What were the populations served?
4. Describe the collaborative relationships and community linkages, including past history of working together, which strengthen your organization's ability to successfully implement the proposed program.
5. Describe your ability to recruit and serve the number of children and youth proposed.
6. If applying as part of a collaborative, describe the collaborative's history of funding, including previously secured funding, as a group.
7. Provide a brief description of your facility(ies) or the facility(ies) where the project is to be implemented that shows how program effectiveness and safety will be assured.
8. Describe the fiscal and management practices that strengthen your organization's ability to successfully deliver the proposed program. Detailed financial information will be provided in Attachment M (two years worth of financial statements) and Attachment N (audit).

Agency History and Capacity will be scored during the review process using the following criteria:

- ✓ To what extent does the program described in this RFP fit the applicant's mission and goals?
- ✓ Is there evidence of organizational commitment to this project?
- ✓ To what extent does the applicant demonstrate appropriate qualifications to undertake the proposed work?
- ✓ To what extent does the applicant's past accomplishments or current projects (and those of its subcontractors, if any) relate to the type of work required under this RFP?
- ✓ Has the applicant delivered similar services of the scope and size of the proposed project?
- ✓ To what extent do the applicant's examples of similar or prior experiences adequately demonstrate the ability to provide deliverables in a timely manner?
- ✓ To what extent does the applicant have relevant experience working with community linkages or collaboratives serving the populations described in the proposal?
- ✓ If this is a Collaborative Program, is there evidence that each partner organization is committed to the project?
- ✓ To what extent does the applicant demonstrate appropriate qualifications to undertake the proposed work?
- ✓ If this is a Collaborative Program, is there evidence that each partner organization is committed to the project? To what extent does the applicant have relevant experience working with collaboratives serving the populations described in the proposal?
- ✓ To what extent does the applicant have adequate facilities and support services at its disposal to perform work under this RFP?
- ✓ To what extent do the applicant's examples of similar or prior experiences adequately demonstrate the ability to manage fiscal resources responsibly?

**C. STAFFING AND STAFF/CONSULTANT QUALIFICATIONS
(10 POINTS)**

1. Identify all staff working on this project, including their expected roles, estimated percent time, and experience they have had in implementing similar projects. Show where any new positions funded by this RFP would fit. Identify the person who will have primary responsibility for managing the project and discuss their experience managing similar projects. Place the resume of the key project staff, including managers and staff working directly with children and youth, responsible for project implementation and delivery of services as **Attachment H**. If staff is not yet hired, attach job description(s).

2. If you are proposing a subcontractor(s) to provide part of the deliverables, please describe the subcontractor's key staff qualifications. Explain the criteria you used to select the subcontractor(s) or, if not yet hired, will use in the selection process. More than one applicant may propose to use the same subcontractor, provided that the subcontractor is capable of fulfilling the services described in each scope of work.

Staffing and Staff/Consultant Qualifications will be scored during the review process using the following criteria:

- ✓ To what extent does the applicant have appropriately qualified staff or engaged appropriately qualified consultants to carry out the designated scope of work?
- ✓ To what extent are their roles and responsibilities clear? Does the organizational chart appear to facilitate successfully carrying out the project?
- ✓ To what extent is the proposed staffing pattern adequate in number and appropriate in level/role?
- ✓ If the applicant is including a subcontractor(s) to provide part of the deliverables, is there appropriate justification for subcontractor duties?

D. PROGRAM DESIGN (35 POINTS)

1. Explain the program design, including plans for implementation and units of service to be fulfilled in the Funding Category to which you are applying, as well as other Funding Categories that will benefit from your project (see Units of Service per Funding Category on **page 43** of this RFP). What are the key activities to be undertaken? What is the timeline for accomplishing them (be sure to allow adequate start-up time)? If you are applying for a two-year project, show activities and timeline by each fiscal year (e.g., FY 2004-2005 and FY 2005-2006)
2. Explain how the proposed program addresses any of OFCY's Program Priorities (see **page 25** of this RFP):
 - a. After-School Programs (which type of After-School Program – Comprehensive, Academic Support, Enrichment, and Recreation)
 - b. Prevention Programs
 - c. Programs Using Models of Child and/or Youth Development Principles
 - d. Programs Providing Cost-Effective Services
 - e. Collaborative Programs
3. Describe how the proposed program contains the Required Program Components described on **page 27** of this RFP:

- a. **Keeping Kids Safe:** 1. There are established systems for tracking youth and others while on site. 2. There is a youth/adult ratio that ensures adequate supervision. 3. There is a site security plan for handling emergency situations.
- b. **Parent/Caregiver and Youth Involvement:** 1. There are opportunities for parent, guardians, and youth to be involved in program design, implementation, and evaluation. Youth involvement should be age appropriate.
- c. **Connections to Caring Adults:** 1. There is an appropriate participant/adult ratio. Enough adults should be involved to ensure that every young person can receive some personalized attention. 2. There is sufficient time spent in relationships. Consistent and regular contact is necessary to develop a trusting relationship with an adult. 3. There are adults involved who can relate to children and youth. Ethnic/cultural background, professional qualifications, and life experience should indicate their potential for relating effectively to children or youth.

NOTE: Programs serving children ages 0-5 years must also demonstrate at least one of the following: 1. How the program fosters relationships between young children and caring adults that did not exist prior to the program. 2. There is a plan for improving the ability of adults in the child's life (parents or caregivers) to care for their children well, through family support models.

- d. **Community Benefit and Enrichment (does not apply to ages 0-5):** 1. The program provides developmentally appropriate opportunities for participants "to give back" to the community by providing services to the community (such as with seniors, neighborhood improvement, etc.)
- 4. Describe what outreach/recruitment activities will occur to increase awareness of and utilization of services or participation in program events.
- 5. Describe any relationships with local partners and stakeholders in carrying out the project. Describe the role of any community advisory groups that may be involved.
- 6. If applying as a Collaborative Program, describe the role of each partner organization and the specific services each partner will provide.
- 7. If applying for two-year funding, provide a rationale based on the criteria described beginning on **page 17** of this RFP.

Program Design will be scored during the review process using the following criteria:

- ✓ To what degree does the community that the applicant proposes to serve and the characteristics of the children and youth who will benefit and/or participate in the proposed program fit with the Funding Categories?

- ✓ To what extent are the units of service and numbers of persons to be reached feasible? Are they reasonable in relationship to the amount of the requested funds?
- ✓ To what extent are the events and timelines for implementing this project feasible?
- ✓ To what extent do the proposed activities respond to the Program Priorities? To what extent has the applicant described a program built on best practices in child and youth development?
- ✓ To what extent does the proposed program incorporate OFCY required program components, such as ensuring the physical and emotional safety of participants?
- ✓ To what extent has the applicant demonstrated active involvement of the communities/parents/youth affected by this project?
- ✓ To what extent does the proposed program incorporate OFCY required program components, such as providing opportunities for participants to develop relationships with caring adults?
- ✓ To what extent has the applicant demonstrated Community Benefit and Enrichment? (does not apply to ages 0-5)
- ✓ To what extent are any planned outreach/promotional activities likely to increase utilization of services or participation in program events?
- ✓ To what extent will other local partners and stakeholders be involved in the project? Are their roles clear? Is the plan for collaboration realistic? Is there evidence of an active role in the project by a community advisory group?
- ✓ Are their roles clear? Is the plan for collaboration realistic? Is the evidence of their participation adequate?
- ✓ If two-year funding is sought, is an adequate rationale given upon which to provide two-year funding? Examples: a decrease in the cost per unit of service; increase in the number of unduplicated clients served at same cost; addressing a need in which little impact can be shown in a twelve-month period; using innovative program design and implementation to address a critical community need for which 2 years evaluation is needed.

**E. OUTCOMES AND EVALUATION
(15 POINTS)**

1. List the anticipated outcomes of the project for which funds are being requested in the format of an outcome statement.

You may wish to use the following to assist in drafting an outcome/result statement to measure the effect of your services, by filling in the blanks for each service outcome:

Effects/Outcomes/Results Statements

Example 1: To reduce the incidences of reported violence among middle school youth at X campus site by 15% in the first year of the program.

Example 2: To increase youth/parent communication (as reported by self-assessment pre and post-tests) among clients by 25% within the first 90 days of the clients' participation in the program cycle.

Example 3: To increase readiness to learn by 20% as measured on entry to Kindergarten for pre-school children in the first year of the program.

2. Describe the indicators or measures that will be used to track progress towards these outcomes.
3. Describe the record-keeping systems used to track data including enrollment, attendance, and the frequency with which services are offered.

Outcomes and Evaluation will be scored during the review process using the following criteria:

- ✓ To what extent has the applicant identified an evaluation plan that includes a description of the outcomes to be achieved?
- ✓ To what extent will the evaluation results fit into and contribute to OFCY's overall evaluation objectives?
- ✓ To what extent are planned resources, including the request for OFCY funds, adequate for achieving the desired results?
- ✓ To what extent has the applicant described appropriate indicators or measures that will be used to track progress towards these outcomes?
- ✓ To what extent do record-keeping systems and data collection methods correspond to and capture the major activities of the scope of work?

F. REQUIRED RESOURCES AND BUDGET REQUEST (10 POINTS)

All applicants must answer questions 1-3.

Proposals using a Fiscal Sponsor should answer the following questions from the perspective of the sponsored entity and not from the perspective of the Fiscal Sponsor.

The information below should supplement the required budget information in Attachments C, D, E, and F.

1. If you are applying for a two-year project, complete a separate budget for each fiscal year (e.g., FY 2004-2005 and 2005-2006.)

2. Describe other resources that are secured or anticipated for this project during the project period.
3. Describe your plans for future resource development. How will you sustain the project efforts after the contract period?

Required Resources and Budget Request will be scored during the review process using the following criteria:

- ✓ To what extent are requested funds appropriate to carry out the project? Is there adequate justification for all line items? Does the funding amount requested relate appropriately to the proposed level of effort?
- ✓ To what degree is the cost per participant appropriate and cost-effective?
- ✓ To what extent are other agency resources, including in-kind, available to support the project?
- ✓ Are the applicant's plans for sustaining the project efforts after the grant period realistic?

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X. REQUIRED ATTACHMENTS

PROPOSAL COVER SHEET

Complete enclosed cover sheet. The cover sheet must be one page. Instructions are below:

Applicant/Fiscal Sponsor

The applicant is the organization or agency that will sign the contract if the grant is awarded. Therefore, if this is a project with a fiscal sponsor, the fiscal sponsor will be the applicant. Information about the Applicant/Fiscal Sponsor must be completed, including total organization budget for FY 2003-2004 (current year).

Sponsored Entity

If the applicant is a Fiscal Sponsor, then information about the sponsored entity must be completed, including total organization budget for FY 2003-2004 (current year).

Federal ID#

If the applicant is a non-profit organization, enter the Federal ID # of the applicant. Public agencies may leave this area blank.

Project Title

Provide a simple and straightforward title for the project. This will be used in identifying the proposal.

Project Summary

In one paragraph (100 words or less), in the space allotted and using a font size no smaller than 12 point, summarize the proposal for which funding is requested. The summary should describe the program in terms of the number served, who will be served (age and other identifying characteristics), with which services, when, where, for what purpose or outcome.

This Project Summary will be used to describe the proposed project throughout the review process. It is important that the Project Summary be clear, concise, and comprehensive. Applicants are strongly encouraged to write well thought through Project Summaries.

Project Budget

Indicate the amount requested from OFCY, the total match amount, and the total project budget. The total project budget should be the sum of the amount requested and the total match amount. If applying for two years of funding, list this information for both years.

Fund

Specify whether the proposal is being submitted to the Small and Emerging Fund or to the General Fund for consideration by OFCY.

Funding Category

Select the appropriate (one) Funding Category under which the proposal is being submitted for consideration.

A. SCOPE OF WORK

Complete sections of the Scope of Work form as indicated below. Enter the applicant name and project title at the top of the form (in the header). Enter the total projected, unduplicated number served. This number represents the total number of children and youth you expect to substantively serve over the course of the program. Youth who are anticipated to participate in multiple program activities should be counted only once to ensure the number is unduplicated.

Above the Chart:

Fiscal Year

Check the box of the fiscal year during which these program activities will be offered. If applying for a one-year grant, simply check the FY 2004-2005. If applying for a two-year grant, complete this form twice: once for FY 2004-2005 and a second time for FY 2005-2006.

Projected Total Unduplicated Number Served

List the projected total unduplicated number of children and youth who will be ongoing clients over the course of the program. Unduplicated means that each participant is counted once, regardless of the number of times he/she participates during the year.

Total Ongoing Participants

Ongoing participants are defined as those who receive services on a regular basis.

Additional Reached

The projected number of people who will have only minimal contact with your program (e.g. audience members, parents, siblings, youth that attend 1-2 times, etc.)

Units of Service per Funding Category

After you have completed the scope of work, enter the total of all units of service per Funding Category and enter into this table. For example, if an activity has a total of 300 units of service and the Funding Category is "W", you will enter "300" above the "W" in the table.

Funding Category Codes:

S	Support for Children's Success in School
W	Child Health and Wellness
T	Healthy Transitions to Adulthood
Y	Youth Empowerment

In the Chart:

Program Activities

List each of the program activities to be funded by this grant. Space is provided for up to **26 activities**.

Program Activity Code

List the program activity code that best fits the program activities from above.

Program Activity Codes:

- 01 Arts activities
- 02 Computer training
- 03 Community Services Activities
- 04 Day care/Child development activities
- 05 Career Education/ Employment training or assistance
- 06 Individual counseling/Mental health services
- 07 Leadership development activities
- 08 Life skills development activities
- 09 Mentoring
- 10 Nutrition/Health services
- 11 Parent education/Parenting skills training
- 12 Sports/Recreational activities
- 13 Tutoring/Academic Assistance
- 14 Other
- 15 Youth-to-Youth Grantmaking activities

Funding Category

List the Funding Category code that best fits the program activities listed.

Funding Category Codes:

- S Support for Children's Success in School
- W Child Health and Wellness
- T Healthy Transitions to Adulthood
- Y Youth Empowerment

Projected Numbers Served

Estimate the anticipated number of children or youth that will participate in the program activity over the course of the year.

Ongoing Participants

The total number of children or youth anticipated to enroll and regularly participate in the program activity over the course of the year. (Grantees will be expected to provide demographic data on ongoing served children and youth including age, gender, ethnicity, zip code, etc., in quarterly progress reports.)

Average Session Participants

The average number of children or youth to receive the service per session the service is offered, i.e. average daily attendance.

Implementation Schedule

Place a number in the space provided to indicate the number of sessions in which services will be offered per month.

Projected Total Number of Sessions

Add the number of sessions indicated in the implementation schedule.

Average Number of Hours

Indicate the number of hours in a session.

Projected Total Units of Service

Multiply the average session participants times the projected total number of sessions times the average number of hours in a session to get units of service.

Days of Activity

Indicate the days of the week for each activity.

Times of Activity

Indicate the times of day for each activity.

School-Linked

Check this box if the program activity is offered at or immediately adjacent to a school site.

After-School Program

Check this box if the program activity is a part of an afterschool program, as described on page 21.

B. LISTING OF ACTIVITY LOCATIONS CONTACTS

Provide complete contact information for each subcontracting (partner) agency using the form provided. (UNDER CONSTRUCTION)

C. SUMMARY BUDGET FORM

The Applicant Agency is required to produce a summary project budget that presents the total of all partners' costs for each budget category. The summary budget form is also required of single agency projects. If applying for a two-year grant, submit a copy of this form for FY 2004-2005 and a copy for FY 2005-2006.

Match

A column labeled "Match" is included in the sample line item budget. The match must be 25% of the total project budget. This column should demonstrate how the 25% required matching funds shall be applied to each of the line items in the budget. For example, if a Project Manager is to be partially funded by OFCY and partially by another grant, the dollar amount paid for by other grant funding should be listed as "Match".

Example: If an agency requests \$75,000 from OFCY to support a project that has a \$100,000 budget, the match must be at least \$25,000.

D. LEAD AGENCY BUDGET FORM

The budget is an important component of your proposal. This document links the funding requested with specific elements of the project proposed. Therefore, the budget proposed should be an appropriate and accurate projection of the project expenses. If applying for a two-year grant, submit a copy of this form for FY 2004-2005 and a copy for FY 2005-2006.

The budget form attached shows the format in which costs associated with the proposed project should be identified.

Listed within each category below is a description and examples of the information that we require in order to review your proposed budget. Each numbered category corresponds to the sample line item budget form.

Budgets must adhere to the funding policies stated earlier in the RFP. Applicants who will be administering a Youth-to-Youth Grantmaking program must budget at least 60% of their request for funding youth projects (described beginning on **page 23** of this RFP).

1. Direct Costs

a. Personnel

In addition to the information required on the line-item budget form, include a detailed description of the activities of each position as it relates to the project in the budget narrative (Attachment F).

Narrative Example: The Project Director is accountable for planning, organizing, and directing the implementation and operations of this project. The base salary for the Project Director is \$40,000. The Project Director will be working on the project half time for 9 months for a total cost of \$15,000.

Fringe and Benefits: This line item represents benefits (health, dental, etc.) as well as mandatory employment costs such as FICA, Social Security, SDI, and unemployment taxes. Indicate what benefits will be provided and how the amount was calculated in the budget narrative. If different rates were used for different individuals, your budget narrative should contain a table that summarizes the calculation for each individual.

Example:

	<u>Salary</u> (based on % of time spent project)	<u>Fringe Rate</u>	<u>Fringe</u>
Project Director	\$15,000	.25 (25%)	\$3,750
Case Manager	\$25,000	.20 (20%)	5,000
Program Assistant	\$20,000	.12 (12%)	2,400
Total Fringe			\$11,150

b. Other Direct Costs

List costs that are directly associated with operating the project. For each line item, describe how estimates were determined in the budget narrative.

Duplicating/Copying

Example: Copying of project correspondence and reference materials to be utilized in the training of the Youth Interns. The total requested budget is \$2,100 per year.

Equipment Lease Agreement(s)

Example: We are requesting the rental of a copy machine for the purpose of copying daily correspondence and documentation related to the OFCY grant. Our vendor has provided us with an estimate of \$200 a month. The total cost for 12 months will be \$2,400.

Equipment/Furniture Purchase

OFCY permits purchase of equipment and capital items for “primary and direct use by children and youth”. However, any single item costing \$500 or more is considered a capital expenditure and the City retains title of all such items and reserves the right to exercise its ownership. Grantees will be required to provide the City with a list and description of any and all items costing \$500 or more that are purchased by OFCY funds.

Itemize the equipment requested and include a statement outlining the ways in which the equipment will be used primarily and directly by children and youth to fulfill project goals. You should explore the option of purchasing vs. leasing/rental, and explain your choice. Generally, OFCY will support only a portion of high-cost equipment line items. Therefore, you should explore whether other sources of funds can be obtained for equipment.

Example: We will require 3 computers to supplement our 7-computer laboratory. These computers will be used by youth in the Young Journalists Club, described on page 5 of our proposal. After calculating the costs of leasing 3 computers versus purchasing the

equipment, we found that purchasing the equipment resulted in a net savings of \$1,050 over the course of the year. The total cost for purchase of three computers is \$2,550.

Facility Rental and Costs

These are the pro-rated costs of space rental, utilities, building maintenance and other occupancy costs that are directly used to provide services for young people.

Example: The organization's cost for space rental, utilities and janitorial services is \$3,000, \$1,500, and \$500 respectively for a total of \$5,000 per month or \$60,000 per year. Thirty percent of the facility will be used for the proposed program, so the direct occupancy cost is \$18,000.

General Office Supplies/Software

Example: The requested supply budget is \$2,500. This includes \$1,000 for office supplies such as tape, stationery, fax paper, pens, pencils, and business cards. Additionally, \$1,500 is budgeted for computer supplies to support the component of our project that involves data analysis.

Postage

Example: The total requested postage budget is \$3,025. This includes mailing routine correspondence as well as the community health assessment questionnaire. The questionnaire is an integral component of our activities as outlined on page 13 of our proposal. The total number of questionnaires to be mailed is 7,500 @ \$.37 rate = \$2,775. The \$250 balance is for mailing of routine correspondence.

Program Materials & Supplies

This category should include all items that your program requires in order to operate, such as recreational equipment, art supplies, workbooks, etc.

Example: Soccer balls, baseballs and bats, basketballs and nets, and volleyballs totaling \$1,000. The youth also need uniforms for the recreation program. These will cost \$300. The total cost for program materials and supplies is \$1,300.

Telephone/Internet/Communications

Example: There are two separate costs associated with this line item: local and long distance calls. Local calls will be made for routine communications and will amount to \$100 monthly. The long distance calls will be made for communication with national and regional offices and other routine communications. The anticipated long distance calls costs for the year are \$3,000. Therefore, the total telephone budget is \$4,200.

Project Staff Travel/Transportation/Meeting Costs

The projected expenditures for local and non-local travel should be described in this section. The basis for the calculation as well as the purpose for all travel should be provided. Local travel estimates should be based on your organization's current policies, for example, 36.5 cents per mile. Any non-local travel needs to be carefully itemized and justified.

Example: As outlined in the job description, the three Case Managers will travel daily between the Project Office and the community for outreach activities. Additionally, they will travel to the local Office of Human Services, clinics, and other resource agencies. We have estimated that they will each travel 100 miles/week X \$0.365 = \$36.50/week. Therefore, the total travel cost for three Case Managers per year (50 weeks) is \$5,475.

Youth Grants

Example: 30 grants will be given out from January 1, 2004 to March 31, 2004. 25 grants will be given out from April 1, 2004 to June 30, 2004. The average grant size is \$500.

Youth Stipends

Example: We will have three youth interns who will work approximately five hours per week on outreach and training for our youth leadership project. Youth interns will receive a stipend of \$200.00 per month for the nine months of the project, so the total cost is \$5,400.

c. Consultants

The need for each consultant must be outlined in detail in the narrative. A work plan for each, including the tasks to be accomplished, should be included. Fees paid by OFCY are not to exceed \$700/day for a full day of work. If the daily rate charged by any particular consultant is more than \$700, you will need to identify other sources of support.

Example: Consultant costs are budgeted at \$6,000/year for the participation of Dr. Green. She will provide expertise in the field of portfolio assessment and will train our program and evaluation coordinators. She will conduct two all-day workshops, participate in project meetings, and provide technical assistance on an as-needed basis. The \$6,000 estimate is based on twelve days/year at \$500/day.

d. Subcontracts

For each proposed subcontract for which you request OFCY support, you should provide an explanatory paragraph in the budget narrative that describes in detail the services to be provided. OFCY should not be listed as a party to the subcontract.

Example: We are requesting \$10,000 for our subcontract with ABC Children's Center. ABC Children's Center will be providing services as outlined in the scope of work. A detailed subcontractor budget form is attached.

2. Indirect Costs

Indirect costs may be calculated up to 10% of the total grant request. This rate is non-negotiable. This line item is intended to cover costs that are necessary to conduct the grant, but which are not readily identified as direct program expenses (e.g. reporting costs, payroll processing, fund development, insurance, evaluation costs, other administrative costs, etc.) This line item does not need to be itemized. However, if your grant is audited by the City of Oakland you must be able to document and justify indirect costs charged to this grant.

Collaborative applicants may also charge up to an additional 5% of the total grant amount (for a total indirect cost of 15% of the total grant request) for collaborative-building costs. This portion of indirect costs must be itemized in Attachment E.

Example: Ten percent of a total grant amount of \$250,000--\$25,000—will be charged as an un-itemized administrative fee. An additional \$12,500 will be charged for collaborative-building activities. One representative from each of the five collaborative partner agencies will be sent to a collaboration workshop offered by Nonprofit Management Solutions. The fee per participant will be \$100 for a total of \$500. We will also hire a consultant at \$60/hr for 200 hours for a total of \$12,000 to facilitate collaborative meetings and work with the collaborative coordinator and other partner agency staff to create better systems of communication within the collaborative. The total indirect costs will be \$37,500.

E. SUBCONTRACTOR BUDGET FORM

Any proposals that involve more than one agency are required to submit line-item budgets for the Applicant (Lead) Agency and each Sub-Contracting (Partner) Agency. Use the same guidelines as for Attachment D. If applying for a two-year grant, submit a copy of this form for FY 04-05 and a copy for FY 05-06.

F. BUDGET NARRATIVE

The budget narrative must be independent of the proposal narrative and must include a separate and complete justification for each line item in the budget. Narrative examples are provided in the description of Attachment D, above. In general, each narrative statement should describe, in as much detail as possible:

- ✓ What the specific item is
- ✓ How the specific item relates to the project
- ✓ How the amount shown in the budget was arithmetically determined

Any proposals that involve more than one agency are required to submit budget narratives for each partner, including the lead agency. If applying for a two-year grant, submit a budget narrative for FY 2004-2005 and a copy for FY 2005-2006.

Label the Budget Narrative “Attachment F” in your application.

G. OVERALL AGENCY BUDGET

Please attach an overall agency budget for Fiscal Year 2003-04 (current year’s budget) of income (committed and requested) and expenses. If there is an ending balance or deficit from preceding years, account for it in the current year’s budget. Label the Overall Agency Budget “Attachment G” in your application and specify whether the budget is that of the fiscal sponsor (applicant) or that of the sponsored entity.

Fiscal Sponsors must submit Overall Agency Budgets for themselves and their sponsored entity.

H. RESUME/JOB DESCRIPTION FOR KEY STAFF

Provide a resume of the one key project staff person responsible for project implementation. If staff is not yet hired, attach a job description. Label the Resume/Job Description “Attachment H” in your application.

I. DEMOGRAPHICS FORM

Please use the form included in this RFP to provide statistical data about the population you propose to serve through OFCY funds. For each chart, estimate the number of youth served according to each category. Calculate the percentage by dividing the estimate for each category by the total number of youth to be served. If applying for two-year funding, this attachment must be completed for each fiscal year.

J. ORGANIZATIONAL CHART AND BOARD ROSTER

Please provide an organizational chart or diagram and a roster of the lead agency’s governing board. The chart should indicate how this program fits into the structure of the organization including staffing, reporting lines, and governance. The chart should show the relationships of staff within the agency delivering services. If there is a Fiscal sponsor or there are partner agencies, the relationships between agencies should be indicated. This chart should be labeled “Attachment J” in your application. This chart will help reviewers assess the applicant’s capacity and how the program fits into the overall mission of the organization. The board roster should indicate officers, affiliations, and addresses of all members. No board roster is required for public agencies.

K. LETTERS OF AGREEMENT

Please note that Letters of Agreement are mandatory for all programs working with Public Agencies, including but not limited to the Oakland Unified School District, City of Oakland Departments, and Alameda County Departments. Proposed programs that are school-linked are required to submit letters of agreement. Provide signed letter(s) of agreement from all participating members of a collaborative. Letters should describe the role, responsibilities, resources they bring to the collaborative, as well as their level of commitment. Please do not attach letters of support. They will not be reviewed.

L. MEMORANDUM OF UNDERSTANDING (IF APPLICABLE)

Any organization using a fiscal sponsor or subcontractor providing substantive youth and children services, must submit a memorandum of understanding signed by the authorized agent for each party. The memorandum of understanding must state that the fiscal sponsor or contractor is aware of their responsibility both fiscally and programmatically for all grant requirements if funds are awarded. The fiscal sponsor will be the applicant and will be the responsible party for the contract if the application is successful.

M. FINANCIAL STATEMENTS (TWO MOST RECENTLY COMPLETED YEARS)

Financial statements of the agency's revenues, expenses and fund balance from both the two most recently completed fiscal years must be attached for all 501(c)(3) non-profit organizations. Audited financial statements are preferred, if available. This requirement does not apply to public agency applicants.

N. AUDIT WITH MANAGEMENT LETTER

If you are applying for \$75,000 or more per year, you must include a copy of the most recent independent audit including cover and/or management letter (signed by auditor and containing any findings) from within the last three fiscal years with your application. The audit must be complete at the time the proposal is submitted. If you are applying for a grant between \$20,000 - \$75,000, include your most recently completed independent audit including cover letter and/or management letter, if available. Public agencies should provide proof of the existence of an independent audit.

O. TAX EXEMPT STATUS/PUBLIC AGENCY STATUS

All applicants must be a public or private non-profit agency. Non-profit agencies must attach a copy of the IRS letter dated 2001 or later certifying their organizations' nonprofit status under section 501(c)(3). Organizations that do not have 501(c)(3) status must apply under the sponsorship of a public agency or an organization holding an IRS 501(c)(3) designation. For-profit agencies are not eligible for funding. No proof is required for public agencies.

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LIFE ENRICHMENT CMTE.
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XI. APPLICATION FORMS

Proposal Cover Sheet

Attachment A: Scope of Work

Attachment B: OFCY Listing of Activity Locations and Contacts

Attachment C: OFCY Summary Budget Form

Attachment D: OFCY Lead Agency Budget Form

Attachment E: OFCY Subcontractor Budget Form

Attachment I: OFCY Demographics Form

**OAKLAND FUND FOR CHILDREN AND YOUTH
2004-2005 GRANT APPLICATION**

APPLICANT/FISCAL SPONSOR	SPONSORED ENTITY (if applicable)
Organization/Agency Name	Organization Name
Federal ID #	Federal ID # N/A
Contact Name	Contact Name
Title	Title
Address	Address
Telephone	Telephone
Fax	Fax
E-mail	E-mail
Total Organization/Agency Budget (FY 2003-2004; Current Year) \$	Total Organization Budget (FY 2003-2004; Current Year) \$

Project Title

Project Description (100 words or less)

Project Budget			
Year	OFCY Request	Match Amount	Total Project Budget
Year 1 (2004-2005)	\$	\$	\$
Year 2 (2005-2006) if requested	\$	\$	\$

Select One Fund

Small and Emerging Organizations Fund General Fund

Select One Funding Category

Support for Children's Success in School Child Health and Wellness Healthy Transitions to Adulthood Youth Empowerment

OFCY GRANT APPLICATION 2004-2005 PROPOSAL COVER SHEET

**Attachment A
 OFCY SCOPE OF WORK FORM**
 (Duplicate Form as Necessary)

Total Grant Requested: _____

Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

Total Ongoing Participants: _____

Projected Total Unduplicated Number Served: _____

Units of Service Per	
S	T
Funding Category	

Line Item	Activity Code	Category (e.g., Research, Treatment, etc.)	Total Number of Unduplicated Participants Served (by Month)	Projected Total Unduplicated Number Served (by Month)												Total Ongoing Participants	Units of Service Per				
				JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		S	T	Y		
1																					
2																					
3																					
4																					
5																					
6																					
7																					
8																					
9																					
10																					
11																					
12																					
13																					

Attachment A
OFCY SCOPE OF WORK FORM
 (Duplicate Form as Necessary)

Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

Total Grant Requested: _____

Total Ongoing Participants _____
 Additional Resolved _____

Projected Total Unduplicated Number Served: _____

	S	W	T	Y
	<i>Units of Service Per</i>			
	<i>Funding Category</i>			

Line Item	Activity Code	Program Category (Phase 1)	Discretionary Participants	Additional Resolved	Units of Service Per	Funding Category
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						

**Attachment B
 OFCY LISTING OF ACTIVITY LOCATIONS AND CONTACTS**

July 1, 2003 - June 30, 2004

Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

Program Title	Organization	Contact Name	Contact Title	Phone Number	Fax Number	Comments
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						

**Attachment B
 OFCY LISTING OF ACTIVITY LOCATIONS AND CONTACTS**

July 1, 2003 - June 30, 2004

Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

Activity	Organization	Contact Name	Contact Title	Address	Phone Number	Fax Number
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						

Attachment C
OFCY SUMMARY BUDGET FORM
 Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

I. DIRECT COSTS	Total Project Budget	OFCY Funds Requested	Match
A. PERSONNEL			
B. OTHER DIRECT COSTS			
C. CONSULTANTS			
D. SUBCONTRACTS			
SUB-TOTAL DIRECT COSTS			
II. INDIRECT COSTS			
TOTAL			
Percent of Total Project Budget			

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Attachment D
OFCY LEAD AGENCY BUDGET FORM
Fiscal Year (Check One): **FY 2003-2004** **FY 2004-2005**

Total Grant Requested: _____

A. DIRECT COSTS			Total Project Budget	OFCY Funds Requested	Match
PERSONNEL					
Lead Agency Positions	Annual Salary	% Time on project			
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
	Per Hour Rate	Number of Hours			
<i>Volunteer Hours (In-kind)</i>			10.50		
Subtotal					
Fringe Benefits & Rate					
SUBTOTAL					
B. OTHER DIRECT COSTS					
Duplicating/Copying					
Equipment Lease Agreement(s)					
Equipment/Furniture Purchase					
Facility Rental					
General Office Supplies/Software					
Postage					
Program Materials and Supplies					
Telephone/Internet/Communications					
Travel/Transportation					
Youth Grants					
Youth Stipends					
SUBTOTAL					
C. CONSULTANTS					
<i>(Do not include youth stipend, youth grants, or subcontractors)</i>					
SUBTOTAL					
D. SUBCONTRACTORS					
Subcontractor 1					
Subcontractor 2					
Subcontractor 3					
Subcontractor 4					
Subcontractor 5					
Subcontractor 6					
Subcontractor 7					
Subcontractor 8					
Subcontractor 9					
SUBTOTAL					
II. INDIRECT COSTS					
1. Rate					
2. Rate					
SUBTOTAL					
TOTAL					

Attachment E OFCY SUBCONTRACTOR BUDGET FORM

Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

Total Grant Requested: _____

A. DIRECT COSTS			Total Project Budget	OFCY Funds Requested
A. PERSONNEL				
Lead Agency Positions	Base Salary	% Time		
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
Subtotal				
Fringe Benefits & Rate				
SUBTOTAL				
B. OTHER DIRECT COSTS				
Duplicating/Copying				
Equipment Lease Agreement(s)				
Equipment/Furniture Purchase				
Facility Rental				
General Office Supplies/Software				
Postage				
Program Materials and Supplies				
Telephone/Internet/Communications				
Travel/Transportation				
Youth Grants				
Youth Stipends				
SUBTOTAL				
C. CONSULTANTS				
(Not to include youth stipend, youth grants, or subcontractors)				
SUBTOTAL				
D. INDIRECT COSTS				
		Rate		
TOTAL				

Attachment I OFCY DEMOGRAPHICS FORM

Fiscal Year (Check One): FY 2003-2004 FY 2004-2005

Projected Total Unduplicated Number Substantively Served: _____

Except where noted percentages should be calculated as a percentage of the **total number served**. The **total number served** should be the same for each chart.

Race/Ethnicity*	# Served	% Served
African American		
Latino/ Hispanic		
Asian/ Pacific Islander		
Native American/ Alaskan Native		
Caucasian		
Multiracial or Biracial		
Other (describe)		
Total		

Gender	# Served	% Served
Female		
Male		
Transgendered		
Total		

Ages to be Served	# Served	% Served
0 – 5 years		
6 – 10 years		
11 – 13 years		
14 – 17 years		
18 – 20 years		
Total		

Disability*	# Served	% Served
Physical		
Cognitive		
Learning		
Mental		
Developmental		
Sensory (Hearing/Vision)		
Total		

Geographic Distribution	Where youth live		Where youth are served	
	#	%	#	%
District 1				
District 2				
District 3				
District 4				
District 5				
District 6				
District 7				
Total				

Populations*	# Served	% Served
Child/youth from a low income family		
Child/youth with low academic performance		
Foster child		
Homeless child/youth		
Limited- or non-English speaking child/youth, or child/youth of non-English speaking parents		
Sexually diverse youth		
Teenage parent		
Youth in the juvenile justice system		
Other (Specify)		
Total		

* Percentages for race & ethnicity, disability, and populations may add up to more than 100% as youth may be counted in more than one category.

XII. GLOSSARY

501(c)(3)

Another term for a nonprofit organization. If an organization has a “501(c)(3) designation” or “501(c)(3) status,” then it is legally a **nonprofit organization** as determined by the Federal Government. If an organization is not a 501(c)(3), then it is not legally a nonprofit organization. If an organization is not a nonprofit organization or a **Public Agency**, it would need a **Fiscal Sponsor** to apply for OFCY funding.

After-school

Programs with services immediately afterschool until early evening (approximately 2-8 pm). For programs that serve school-aged children and/or youth.

After-school Initiative

A proposal to leverage publicly funded OUSD school with City funding to create, develop, and coordinate comprehensive, school based afterschool programs.

Applicant

The “entity” or group applying for OFCY funding. The applicant must be a **Public Agency** or a **Nonprofit Organization**.

Bidder/Bidders Conference

A bidder is a potential Applicant who might submit a Grant Application. After the RFP is released to the public, potential applicants attend a Bidders Conference to learn about the RFP. At the Bidders Conference, potential applicants may ask OFCY staff questions about the RFP.

Board of Directors¹

A Board of Directors is a required organizational component of a corporation, whether it is a for-profit or **Nonprofit Organization**. Boards have formal responsibilities and ensure that funds are used to fulfill the mission of the organization. Formal responsibilities of Boards include, but are not limited to:

1. To ensure that the organization stays in compliance with laws and regulations relating to nonprofit corporations
2. To ensure that the organization uses its resources toward the fulfillment of its mission as stated in its tax-exempt **501(c)(3)** purpose
3. To determine the organization’s mission, strategies, and program priorities
4. To hire and supervise a Chief Executive Officer or Executive Director who manages the corporation

Cap

The maximum amount of money that can be requested. Caps are placed on the entire amount an applicant can request. Caps are also placed on specific items within the applicant’s budget.

¹ Adapted from Jan Masaoka, *Action Handbook for Boards*, Support Center for Nonprofit Management, 1995, p.8.

Capacity, Capacity Building

The ability of a public agency or nonprofit organization to provide **Services** to the **Client**. Applicants must show that they have adequate capacity to do all of the things that they say they will do in their applications. Capacity Building means increasing an organization's ability to provide services to the Client. Capacity Building could mean, for example, improving an organization's business or management skills. Capacity Building is usually provided through some form of **Technical Assistance**.

CBO.

Community Based Organization

Client/Customer, Unduplicated Client/Customer

The person receiving **Service** from a public agency or nonprofit organization. The client in OFCY is a child or youth. An Unduplicated Client is a client that is counted only once, no matter how much service the client receives. Example: if 1 youth attends an afterschool program 3 days per week for 25 weeks per year, this youth would be counted as 1 unduplicated client even though s/he would attend the program approximately 75 times per year.

Comprehensive After-school

Programs with services immediately afterschool until early evening (approximately 2-8 pm) and offer an academic, recreational, and enrichment component for 3-5 days a week.

CMO

The City Manager's Office serves as the top administration office for the City.

Consent

A term used as part of the City Council process to indicate that an agenda item is non-controversial.

Cost-Effective

Costs that are at or below what can be expected for running programs that provide quality **Services**. Keep in mind that different kinds of services will have different costs. For example, it may cost more to run a one-on-one counseling program than it does to run a group sports program, so total cost or **Cost Per Unit of Service** alone cannot be used to determine whether a program is cost-effective.

Cost per Unit of Service

Cost per Unit of Service is the amount of money it takes to provide 1 **Unit of Service**. A Unit of Service is simply a measurement of the amount of **Services** provided to the **Client**. OFCY has defined 1 Unit of Service to be the same as 1 hour of service. For example, if a youth receives 3 hours of tutoring, that would count as 3 Units of Service. For example, if it costs \$24 to provide 3 Units of Service (3 hours of tutoring), then the Cost per Unit of Service would be:

$$\$24 / 3 \text{ Units of Service} = \$8 \text{ per Unit of Service}$$

Emerging Organization

Emerging organizations are new organizations that have provided services (for which OFCY funds are sought) for a minimum two years. Emerging organizations may also be those that

recently received 501(c)(3) status, after having been fiscally sponsored by a public agency or a 501(c)(3) nonprofit organization.

Evaluation

The process of collecting and analyzing information about a program to determine what works and what needs improvement. OFCY programs must be evaluated by a professional evaluator. Results of the evaluation are published twice per year.

Financial Statement

A Financial Statement is usually prepared by a certified public accountant and contains an organization's report of revenues and expenditures. New nonprofit organizations may have a very simple financial statement that is prepared by a bookkeeper or by the board treasurer. It can be audited or not audited. Financial Statements should be accompanied by an explanation of any findings of concern. Audited Financial Statement reports are accompanied by a cover letter and/or management letter, which contains any findings and is signed by the independent auditor. All applicants requesting OFCY funds must submit financial statements for the two most recently completed Fiscal Years. In addition, all applicants requesting \$75,000 or more must also submit an independent auditor's report, cover letter and/or management letter completed for Fiscal Year 2000 or later.

Fiscal Sponsor (sometimes referred to as a Fiscal Agent)

A **Public Agency** or a **Nonprofit Organization** that applies to OFCY funding on behalf of another organization that is not a public agency or nonprofit organization. The Fiscal Sponsor manages the money and is responsible for making sure that the program is carried out.

Funding Categories, Funding Priorities

These mean the same thing. These are the major goals OFCY wants to accomplish and what OFCY will pay for. There are 4 Funding Categories/Funding Priorities (major goals) under which programs may request funding from OFCY:

1. Services that promote Children's Success in School (ages 0-13)
2. Services that promote Child Health and Wellness (ages 0-13)
3. Services that promote Healthy Transitions to Adulthood (ages 14-20)
4. Services that promote Youth Empowerment (ages 11-20)

In the OFCY **Strategic Plan**, the above are called Funding Priorities. In the OFCY RFP, the above are called Funding Categories.

Grant, Grant Application/Proposal, Grantee

Grant is the money awarded to the **Applicant** that is selected to receive funding. Grant Application/Proposal is what the Applicant writes to request money from OFCY. The Grantee is the public agency or nonprofit organization that receives a grant.

Indicators²

Indicators are the specific items of information that track a program's success on **Outcomes**.

² Adapted from James Bell, et al., *Measuring Program Outcomes: A Practical Approach*, United Way of America, 1996, p. xv.

Indicators describe observable, measurable characteristics or changes that represent achievement of an **Outcome**. For example, a program with a desired **Outcome** that participants pursue a healthy lifestyle might choose to measure Indicators such as: whether a participant successfully quits smoking; whether a participant increases levels of physical activity; or whether a participant's knowledge of HIV/AIDS is increased. The number and percent of a program's participants who demonstrate these changes in knowledge, behaviors, and/or skills is an Indicator of how well the program is doing with respect to the desired **Outcome**.

Indirect Costs

Indirect Costs are sometimes called "overhead" or "administrative" costs. Indirect Costs are expenses associated with operating an organization as a whole. Indirect Costs are expenses that are not specifically generated from running an individual program or project within that organization. Examples of Indirect Costs are rent, insurance premiums, repairs/maintenance, and salaries of administrative personnel such as bookkeepers or accountants. An organization may not use more than 10% of its OFCY grant for Indirect Costs.

Inputs³

Inputs are resources a program uses to achieve program objectives. Examples are staff, volunteers, facilities, equipment, curricula, and money. A program uses Inputs to support program activities. Inputs have an influence on a program's **Outputs** and **Outcomes**.

LEC

Life Enrichment Committee – A subcommittee of the City Council. The Subcommittee reviews all Department of Human services agenda items before they go to the City Council.

Match, Matching Funds

The amount of money that the Applicant or Grantee states it will raise in addition to OFCY money. All Applicants must show that they will raise a match of at least 25% of the total program cost. OFCY will not pay for more than 75% of a program's cost.

Measure K – Kids First! Initiative

The Oakland Fund for Children and Youth (**OFCY**) was established in November 1996, when over three-fourths of the voters expressed a powerful commitment to their children and youth by passing the Kids First! Initiative (Measure K). This initiative was the result of a grassroots effort including young people, parents, teachers, community organizers, staff from youth-serving organizations, and many others who were instrumental in placing the Measure K- Kids First! Initiative on the ballot.

Non-Consent

A term used as part of the City Council process to indicate that an agenda item is controversial and will require a discussion.

³ Adapted from James Bell, et al., *Measuring Program Outcomes: A Practical Approach*, United Way of America, 1996, p. xv.

Nonprofit Organization

A nonprofit organization is an organization that has **501(c)(3)** status as determined by the Federal Government. If an organization is not a 501(c)(3), then it is not legally a nonprofit organization. If an organization is not a nonprofit organization or a **Public Agency**, it would need a **Fiscal Sponsor** to apply for OFCY funding.

OASCT

Oakland Afterschool Coordinating Team.

OFCY

Oakland Fund for Children and Youth. Some members of the community refer to OFCY as **Measure K** - the Kids First! Initiative.

Outcomes⁴

Outcomes are benefits for participants during or after their involvement with a program. Outcomes are not the same as **Outputs**, nor are they measures of how many clients are served, how many program activities are delivered, nor the total number of **Units of Service**. Outcomes relate to positive changes in knowledge, skills, attitudes, values, behavior, condition, or status. Examples of Outcomes include improved health status, increase in reading skills, more effective responses to conflict, getting a job, and having greater financial stability.

For a particular program, there can be various levels of Outcomes, with initial Outcomes leading to longer-term ones. For example, a youth in a mentoring program who receives one-to-one encouragement to improve academic performance may attend school more regularly, which can lead to getting better grades, which can lead to graduating, which can lead to attending college.

Outcomes are influenced by a program's **Inputs** and **Outputs**. Outcomes are measured using **Indicators**.

Outputs⁵

Outputs are products of a program's activities, such as the number of meals provided, classes taught, brochures distributed, or participants served. OFCY measures Outputs in terms of **Units of Service**. A program's Outputs should produce desired **Outcomes** for the program's participants. Outputs are influenced by a program's **Inputs**, and also have an influence on a program's **Outcomes**.

POC

Planning and Oversight Committee. The POC is responsible for making all recommendations to the City Council regarding OFCY. The POC members are Oakland residents appointed by the City Council and the Mayor. There is one adult and one youth appointed by each City Council

⁴ Adapted from James Bell, et al., *Measuring Program Outcomes: A Practical Approach*, United Way of America, 1996, p. xv.

⁵ Adapted from James Bell, et al., *Measuring Program Outcomes: A Practical Approach*, United Way of America, 1996, p. xv.

Member (there are 7 districts). One adult and one youth are appointed to the POC by the “At-Large” Council Member. The Mayor appoints three POC members, at least one of whom must be a youth. There are a total of 19 POC members, at least 9 of whom must be youth. At each POC meeting, there must be a minimum of 10 POC members (Quorum) present to vote on an issue.

Program Components (Required)

These are program elements that must be incorporated into all proposed programs regardless of the **Funding Category/Funding Priority** (major goals) to which the program belongs. The required Program Components for all programs requesting OFCY funding must include plans for:

1. Keeping Kids Safe
2. Parent/Caregiver and Youth Involvement
3. Connections to Caring Adults
4. Community Benefit and Enrichment

Program Priorities

Not to be confused with **Funding Categories/Priorities** (major goals) or **Program Components** (required elements in programs). Each Funding Category/Priority has within it Program Priorities, which describe the way that programs are delivered. OFCY has determined that it prefers programs that deliver **Services** to clients in the following ways:

1. After-School Programs (programs that take place immediately after school)
2. Prevention Programs (programs that teach children and youth to avoid challenges before they occur – programs that work with children and youth already experiencing challenges are usually called “Intervention Programs”)
3. Programs Using “Models” of Child and/or Youth Development Principles (programs that copy other programs that are proven by research and/or evaluation to work well)
4. Programs Providing **Services** that are “**Cost-Effective**”

Public Agency

An agency that is part of a government (City, County, State, or Federal). A school district, public library, or any “department” of a City, County, State, or the Federal Government would be a public agency. If an organization is not a **nonprofit organization** or a Public Agency, it would need a **Fiscal Sponsor** to apply for OFCY funding.

Qualitative

Qualitative is a term used to describe research that collects responses from people that are usually based in opinions. Information collected from interviews and focus groups are examples of Qualitative research. No definition encapsulates qualitative research completely.

Quantitative

Quantitative is a term used to describe research design or modes that count or tabulate information. Information collected from tests and surveys are examples of Quantitative research.

Quorum

The minimum number of members who must be present at a meeting in order to vote on an issue.

Without this minimum number present, no voting may take place. For the OFCY POC, Quorum is 10 out of 19 members.

RFP

Request for Proposals – a document that describes how proposals for funding must be written.

School-Linked Programs

School-linked programs are programs involving formal agreements, such as documented partnerships or collaborations, between community organizations and schools to provide services to children and youth.

Services

What the Client actually gets (type of service). Services would be, for example, tutoring, mentoring, counseling, or health education.

Strategic Plan

A formal document that expresses major goals, objectives, and priorities. A Strategic Plan is usually written to guide a group’s decision-making process. OFCY has a Strategic Plan that is used to prepare the RFP and to determine what is important in the Evaluation of OFCY funded programs. OFCY’s Strategic Plan is written every four years (October 1997, October 2001, and October 2005).

Target Population, Target Age

Target means “intended for.” The Funding Categories/Priorities have “target” populations and age ranges, which mean that programs must be “intended for” these specific populations and ages. A Population is simply a group of people with common characteristics such as race, ethnicity, gender, or income level.

Technical Assistance

Providing help to an organization. Usually, this help is to improve an organization’s Capacity (Capacity Building).

Unit of Service

A Unit of Service is simply a measurement of the amount of Services provided to the Client. OFCY has defined 1 Unit of Service to be the same as 1 hour of service. For example, if a youth receives 3 hours of tutoring, that would count as 3 Units of Service.

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OCT 28 2003



**Oakland Fund
for
Children and Youth**

**2004 – 2005 Request for Qualifications (RFQ)
An Initiative for Comprehensive School-Based
Afterschool Programs**

Proposals Due: Friday, January xx, 2004 by 5:00 p.m.

**OAKLAND FUND FOR CHILDREN AND YOUTH
150 FRANK OGAWA PLAZA, SUITE 4216
OAKLAND, CA 94612
(510) 238-6379
www.ofcy.org**

DRAFT

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I. INTRODUCTION

A. PURPOSE

OFCY is issuing this RFQ to solicit proposals from partnering non-profit organizations to provide a comprehensive afterschool program for school-aged children and youth in Oakland. The initiative will 1) focus the resources currently spent on afterschool activities by OFCY; 2) leverage existing funds and capacity of OUSD 21st Century Learning Center and After School Education and Safety Program (ASESP) sites; 3) encourage partnership and coordination among afterschool service providers in Oakland; and 4) expand the number of Oakland youth served in a comprehensive afterschool program.

The anticipated overall outcomes for the Afterschool Initiative include:

1. An increase in the number of children and youth served by comprehensive afterschool programs citywide.
2. An increase in the percentage of OFCY customers served by comprehensive afterschool programs citywide.

The total amount of funds to be disbursed under the initiative will not exceed \$3.5 million citywide. The total Measure K funds available for the 2004-2005 program year are anticipated to be \$8.2 million. The balance of funds not awarded through this RFQ will be awarded through the OFCY general Request for Proposals (RFP) process.

B. BACKGROUND

The existence of juvenile crime and crimes against youth, an increased need for child care for working families, and the severe gaps in academic achievement have reinforced the need for safe, enriching places for young people to be during afterschool hours. It is well documented that quality afterschool programs can provide positive growth and development to young people as they navigate challenging life situations.

A volume of research exists on the value of afterschool programs and points to the necessity of afterschool programs. In Los Angeles, the City and school district partnered to create an innovative after school program called the Better Educated Students for Tomorrow (BEST) program¹. The latest study on the impact of the LA's BEST program showed, among other positive outcomes, that participants have fewer days of absences and show positive achievement on standardized tests in mathematics, reading and language arts.

In Oakland, as in most urban centers, there are a variety of programs for youth afterschool, largely due to communities and organizations that have worked hard to

¹ <http://www.lasbest.org/>

provide those opportunities. However, public agencies must begin to provide an approach to afterschool programming that is more strategic and coordinated and one that meets the developmental demands of young people. This RFQ will address the need for coordinated afterschool programs and provide for capacity building among the partners and in the communities where services are provided.

Oakland Fund for Children and Youth

The Oakland Fund for Children and Youth (OCFY) was established in November 1996, when over three-fourths of the voters expressed a powerful commitment to their children and youth by passing the Kids First! Initiative (Measure K). Measure K amends the City Charter, setting aside 2.5% of the City's unrestricted General Purpose Fund to support direct services to youth under 21 years of age.

OFCY has an initial twelve-year lifespan. This RFQ is for services in Year 7 of the Measure K Initiative. The 2.5% set aside is currently estimated to be approximately \$8.2 million for the program year 2004-2005.

OFCY is governed by a 19 member Planning and Oversight Committee (POC) that is composed of adults and youth appointed by the Mayor and City Council. The POC is responsible for the final recommendation of all OFCY funding awards.

On October 23, 2001, City Council adopted the new *OFCY 2002-2006 Strategic Plan*. The *OFCY 2002-2006 Strategic Plan* may be downloaded from the Oakland Fund for Children and Youth website at www.ofcy.org. The Strategic Plan identifies four funding priorities for OFCY. The Afterschool Initiative under this RFQ is consistent with the funding priority to provide support for "Children's Success in School", and is consistent with the long range vision and strategies embodied in the Strategic Plan.

The POC continues to place a high value on afterschool programming that is not school based and ones that do not rely upon neither 21st Century nor ASESP funding. The POC will continue to provide support for all afterschool programs through the general RFP. Over the first six years of Measure K, the OFCY has increased support for funding for afterschool programs through the general RFP.

21st Century Community Learning Centers

The No Child Left Behind Act of 2001, signed into law on January 8, 2002, authorizes the California Department of Education (CDE) to administer the California 21st Century Community Learning Centers (21st CCLC) program. This State-administered program provides five-year grant funding to establish or expand afterschool programs that provide students, particularly students who attend schools in need of improvement, with academic enrichment opportunities and supportive additional services necessary to help the students meet state and local standards in the core content areas.

The expressed purpose of the program is to provide opportunities for communities to establish or expand activities that focus on: 1) improved academic achievement, 2) enrichment services that reinforce and complement the academic program, and 3) family literacy and related educational development services.

There are currently thirty-two 21st Century Learning Center sites in Oakland. Oakland Unified School District received the largest block of 21st Century Community Learning Center funding in the State. 21st Century Community Learning Centers partially fund comprehensive afterschool programs. This RFQ seeks to supplement and support sites that have skeletal programs and to continue to support increased coordination at those sites.

21st Century funding is based on *positive school attendance*. Positive school attendance requires that school sites be reimbursed for expenses based on the daily attendance of participants. Currently, the reimbursement rate is \$5 per child per day. Additionally, the selection of 21st Century schools is based on both need and capacity.

After School Education and Safety Program (ASESP)

The After School Education and Safety Program (ASESP) is the result of the 2002 voter approved initiative, Proposition 49. This proposition amends California Education Code 8482, to expand and rename the existing Before and After School Learning and Safe Neighborhood Partnerships Program. The ASESP funds the establishment of local after school education and enrichment programs. These programs are created through partnerships between schools and local community resources to provide literacy, academic enrichment and safe constructive alternatives for students in kindergarten through ninth grade. The increased ASESP funding is designed to: 1) maintain existing before and after school program funding, and 2) provide eligibility to all elementary and middle schools that submit quality applications.

Oakland Afterschool Coordinating Team (OASCT)

More than a year and a half of increasing interest in Oakland's afterschool programs culminated in the creation of the Oakland Afterschool Coordinating Team, a coalition of public agencies, service providers, and community members charged with improving and expanding afterschool programming in Oakland.

The OFCY advances this afterschool initiative in order to address the program and funding gaps in afterschool programs in underserved areas as identified by the Oakland Afterschool Coordinating Team.

The vision for afterschool in Oakland as adopted by the Oakland City Council is that:

Every Oakland student has access to high quality afterschool programming that includes academic, recreation and enrichment activities and is offered for two to three hours daily. Oakland is committed to this vision because data shows that children who participate in quality afterschool activities have more success in school, are safe, and make healthier choices.

II. THE INITIATIVE DESCRIPTION

OFCY's primary interest is to fund initiatives and programs providing comprehensive afterschool activities and programs for children and youth in public schools. The programs and services must be provided at a public school that can provide a match

with 21st Century and ASESP funding to best maximize limited resources through coordination.

Grants awarded will be for 2 years to allow programs to develop, build capacity, and demonstrate impact on student achievement and program outcomes. The two year grant will be renewable after the first year, pending satisfactory evaluation and grant monitoring reports.

Programs applying must be collaborative, school based, and provide comprehensive afterschool activities. Comprehensive activities must include an academic, recreation and enrichment components for no less than three hours a day at least 5 days per week.

Comprehensive afterschool program include a wide range and choice of activities to include all three essential components of afterschool programming (academic support, enrichment, and recreation)

- ⇒ Middle Schools: Programs must be offered a minimum of 3 days a week for at least 3 hours per day. Formal registration is required and participants must attend
- ⇒ Elementary Schools: Programs must be offered a minimum of 5 days a week for at least 3 hours per day. Formal registration is required and participants must attend

The initiative places a strong emphasis on neighborhoods in Oakland that are underserved and, to the extent possible, grants will be distributed geographically across the City.

A. PROGRAM MODEL

Each collaboration must demonstrate how it will create an coordinated comprehensive afterschool program at each school site using the following as the core model:

- **Academic Support** component funded by the 21st Century Community Learning Center grant and/or ASESP funding, and other private and public funding.
- **Enrichment and/or Recreation** component funded through the Oakland Fund for Children and Youth and other private and public funding.

Academic, Enrichment and Recreation components can be provided by a combination of OUSD certificate teachers and/or community based organization staff.

Collaboration and Partnership

The comprehensive afterschool program model must be **collaborative** in nature. The need to coordinate all programs at a school site is crucial for afterschool success. Organizations must form or demonstrate a partnership with public schools, community based organizations (CBO), and other public partners. Older more established

collaboratives might have a higher level of collaboration that emphasizes neighborhood strengths, needs, and realities.

The collaborative should also strive to incorporate existing programs being offered at a school site, such as Oakland Parks and Recreation Department and Oakland Public Library programs. The collaborative should examine how other partners will be best coordinated within the model.

For the Afterschool Initiative, a collaborative must consist of three or more substantially participating agencies working together toward a mutual goal, and at least two agencies must propose to receive OFCY funds. At minimum, the collaborative must have already secured 21st Century funding or ASESP funding that will be supplemented with OFCY funding. OFCY strongly encourages collaboration between private non-profit and public entities to create and/or to strengthen linkages that maximize the cost-effectiveness and quality of service delivery.

The afterschool program must have, at minimum an on-site coordinator to facilitate and coordinate site logistics, payments, and school/program communication. Up to \$25,000 or half, whichever is less, of this coordinator's salary can be funded by the grant. The coordinator position can be the same individual that might serve as a cluster coordinator, school site coordinator, or other existing program position.

School Based

The model must also be **school based**. School based means that services must take place at an Oakland Unified School District (OUSD) middle or elementary school campus OR a City recreation facility or library directly adjacent to the OUSD school site.

School based also means that there is a partnership with the school principal and personnel, and the OUSD. Memorandums of Understanding (MOU) will be required with each partner in the collaborative and the individual or group of school site(s) as attachments in the proposal.

The following chart shows expected average costs for typical afterschool programs for 60, 80, and 100 students. Afterschool programs vary from site to site, but the chart is intended to give an idea of reasonable costs per student and hours of service. This is intended to be a target, not an exact estimate of costs.

Number of Youth Served	Average Cost per student per day	Average cost per unit of service (total program budget)
60 Youth	\$16	\$4.92
80 Youth	\$15	\$4.69
100 Youth	\$14	\$4.55

Definition of Comprehensive Afterschool

Three essential components of quality afterschool programming include:

- **Academic support** – For example: Homework assistance, tutoring, literacy and related academic support. Develops learning, research and organizing skills.
- **Enrichment programs** – For example: Classes, clubs and drop-in programs with an emphasis on beyond-academic activities (visual arts, culture, dance, computer literacy, mentoring, community service learning, etc.). Develops creative expression, craftsmanship, and presentation skills.
- **Recreation** – For example: Sports (league and intramural), physical activities, and games. Develops physical agility, coordination and teambuilding.

Comprehensive afterschool program include a wide range and choice of activities to include all three essential components of afterschool programming (academic support, enrichment, and recreation)

- ⇒ *Middle Schools*: Programs must be offered at a minimum of 3 days a week for a minimum or 3 hours per day. Formal registration is required and participants must attend on a regular basis.
- ⇒ *Elementary Schools*: Programs must be offered at a minimum of 5 days a week for a minimum or 3 hours per day. Formal registration is required and participants must attend on a regular basis.

Additionally, programs are required to institute a formal registration process to include a sign-in and sign-out policy for participants and a mandatory attendance policy.

This Afterschool Initiative falls under the OFCY Support for Children's Success in School funding priority of the OFCY 2002-2006 Strategic Plan.

B. SCHOOL SITES ELIGIBLE FOR FUNDING

Any public elementary and middle school in Oakland that has secured 21st Century funding or ASESP funding is eligible to apply.²

Please see Appendix 1 for a list of all eligible schools.

C. GRANT SIZE AND MATCH REQUIREMENTS

1. Grants available for a two-year period of support. The two-year grant will be renewable after the first year, pending satisfactory evaluation and grant monitoring reports.

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² See Appendix 1

2. Although there is no minimum grant size, the minimum number of youth served must be 60. The maximum grant size depends on the number of proposed sites and youth served.

Following are some estimated guidelines based on the average cost per youth served and the number of youth served.³

Number of Youth Served	Maximum Grant Size per Site
60 Youth	\$100,000
80 Youth	\$132,000
100 Youth	\$165,000

3. Requests for funding must be matched with the Core Grant and Direct Access portions of the 21st Century Learning Center funding and/or ASEP funding. Any other match can include cash or in-kind services and must support the cost of the proposed program (see Post Award Requirements on **page 15** of this RFP).
4. No more than 15% of the total amount requested from OFCY may be used for indirect costs.

D. AFTERSCHOOL INITIATIVE OBJECTIVES

When developing proposals for this RFQ, applicants should be aware that the Afterschool Initiative addresses a set of key objectives. Priority will be given to proposals that address the following objectives:

- 1st Promote and Meet Quality Standards for Afterschool**
- 2nd Promote collaboration and partnership through sharing best practices, curriculum and program development, technical assistance, and innovative services and practices**
- 3rd Alignment of evaluation and data collection methods with OFCY, OUSD, and OASCT efforts.**
- 4th Demonstrate long-term commitment to institutionalize afterschool programs.**
- 5th Use Models incorporating Child and/or Youth Development Principles**

Visit the OFCY website, www.ofcy.org/best_practices.html, for references.
- 6th Provide Cost Effective Services**

1. The proposed program demonstrates adequate overall cost per unit of service in relation to the units of service provided.

³ Assumes 150 program days at about \$16 per child/per day.

2. The proposed program demonstrates that cost per unit of service is competitive with the cost of similar services available from other service providers.

Finally, performance and accountability for service delivery are objectives of this initiative that will be assessed through the OFCY evaluation process. Please be realistic in your estimates of the number of participants to be served. Programs falling significantly short of targets may receive reduced funding in subsequent years.

Visit the OFCY website, www.ofcy.org, to view the 2002-2003 Evaluation for similar services of other service providers.

E. QUALITY STANDARDS

In October 2002, the Oakland Afterschool Coordinating Team adopted a set of quality principles that are to apply to every publicly funded afterschool program in Oakland.

Those Quality Standards⁴ are that programs are:

- Are physically and emotionally safe
- Have developmentally appropriate activities
- Strive to be inclusive
- Encourage multiple supportive relationships
- Facilitate community involvement of children and youth

III. PROPOSAL NARRATIVE

Each element of the Proposal Narrative must be presented in the order below. Proposal Narratives will be reviewed and scored based upon the adequacy and thoroughness of the response to the RFQ requirements. The relative importance of the evaluation criteria are provided below as a guide to help you write your proposal:

Narrative Elements

Demonstration of Youth Served and Need
Agency History and Capacity
Staffing and Staff/Consultant Qualifications
Program Design
Outcomes and Evaluation
Required Resources and Budget Request

Use the following elements to prepare a Proposal Narrative, which must adhere to the formatting requirements described on **page 16** of this RFP.

⁴ See Appendix 2

A. DEMONSTRATION OF YOUTH SERVED, SERVICE LEVELS, AND NEED

1. Briefly describe the school(s) and community in which you are working and the characteristics of the youth who will participate in the proposed program.
2. Address the number of youth to be served at each site.
3. Explain why the project is needed (e. g., what are the deficiencies, gaps, and other factors that show evidence of the need for this particular project?).

B. AGENCY HISTORY AND CAPACITY

Applicants should answer questions 1-4 from the perspective of each organization and/or agency in the collaborative and question 5 from the perspective of the lead agency.

1. Describe the organization(s) applying for funds, including history, mission, and types of services provided by the organization(s). How does your mission fit with the mission and goals of OFCY?
2. Describe similar current or past projects or services or accomplishments that relate to the type of work required under this RFQ. What was the size or scope of those efforts? What were the populations served?
3. Describe the collaborative relationships and community linkages, including past history of working together, which may strengthen your organization's ability to successfully implement the proposed program.
4. Provide a brief description of your facility(ies) or the facility(ies) where the project is to be implemented. (For example, the location, description of space, amenities, security, etc.)
5. Describe the fiscal and management practices that strengthen your organization's ability to successfully deliver the proposed program. Detailed financial information will be provided in Attachment N (two years worth of financial statements) and Attachment O (audit)

C. STAFFING AND STAFF/CONSULTANT QUALIFICATIONS

1. Identify all staff working on this project, including their expected roles, estimated percent time, and experience they have had in implementing similar projects. Show where any new positions funded by this RFQ would fit. Identify the person who will have primary responsibility for managing the project and discuss their experience managing similar projects. Place the resumes of the key project staff, including managers and staff working directly with children and youth, responsible for project implementation and delivery of services as **Attachment I**. If staff is not yet hired, attach job description(s).

2. If you are proposing a consultant(s) to provide part of the deliverables, please describe the consultant's key staff qualifications. Explain the criteria you used to select the consultant(s) or, if not yet hired, will use in the selection process. More than one applicant may propose to use the same consultant, provided that the consultant is capable of fulfilling the services described in each scope of work.

D. PROGRAM DESIGN

1. Explain plans for implementation and units of service to be fulfilled. What are the key activities to be undertaken? What is the timeline for accomplishing them (be sure to allow adequate start-up time)? Please show activities and timeline by each fiscal year (e. g. , FY 2004-2005 and FY 2005-2006). This answer should correspond to the Scope of Work Form(s).
2. Address how you will coordinate the Academic, Enrichment and Recreation components and how you will make joint decisions.
3. Describe how the proposed program contains the Quality Standards as described on **page 9** of this RFQ:
 - Are physically and emotionally safe
 - Have developmentally appropriate activities
 - Strive to be inclusive
 - Encourage multiple supportive relationships
 - Facilitate community involvement of children and youth
4. Describe what outreach/recruitment activities will occur to increase awareness of and utilization of services or participation in program events.
5. Describe any relationships with local partners and stakeholders in carrying out the project. Describe the role of any community advisory groups that may be involved.

E. OUTCOMES AND EVALUATION

OFCY and the OUSD 21st Century afterschool programs are engaged in an extensive evaluation. The evaluation is based on a logic model that analyzes effort, effects, and outcomes. We will be measuring student achievement, intermediate program outcomes, and working with the School District to measure indicators such as grade point averages, CAT6 test scores, school attendance, and suspension rates.

The current evaluation system presents a comprehensive assessment of OFCY programs relying on the following elements:

- Outcomes and results based in child and youth development theory
- Application of the Theory of Change Logic model at the Program level
- Youth to youth evaluation and participation in the evaluation

Funded programs are required to participate fully in the OFCY evaluation process so that meaningful data may be gathered to report to all parties interested in OFCY. Participation in the OFCY evaluation includes, but is not limited to attending trainings and workshops, gathering adequate data as determined by the evaluator on effort and results, and hosting site visits.

The OFCY evaluation team will work with programs to establish individual program outcomes, as well as afterschool program outcomes that apply to all programs.

1. Describe the record-keeping systems used to track data including enrollment, attendance, and the frequency with which services are offered.
2. Describe your internal or program evaluation plan.

F. REQUIRED RESOURCES AND BUDGET

Proposals using a Fiscal Sponsor should answer the following questions from the perspective of the collaborative and not from the perspective of the Fiscal Sponsor.

The information below should supplement the required budget information in Attachments C, D, F, and G.

1. Describe the other resources that are secured or anticipated for this project during the project period.
2. Describe your plans for future resource development. How will you sustain the project efforts after the contract period?

Please make sure to complete a separate budget for each fiscal year (e. g. , FY 2004-2005 and 2005-2006.) Also, provide your current year's budget and source of funds.

IV. ELIGIBILITY

A. APPLICANTS – WHO CAN APPLY?

1. Each application must come from a collaborative partnership that includes a minimum of at least one community-based organization and a public school with a 21st Century grant or ASESP funding, as listed in Appendix 1. Proposals can include more than one school site. A collaborative must consist of three or more substantially participating agencies.
2. The lead applicant must be a 501(c)(3) non-profit organization.
3. Entities that do not have 501(c)(3) non-profit status must be fiscally sponsored by a 501(c)(3) non-profit organization. In this case, the fiscal sponsor is the applicant.

The fiscal sponsor will contract with the City of Oakland should OFCY award a grant to the fiscally sponsored program. The City of Oakland would hold the fiscal sponsor responsible as the official Contractor. The fiscal sponsor will be legally liable for all aspects of the contract including program implementation, fiscal management, and communication with the City of Oakland regarding subcontractor or fiscal partner activities. The fiscal sponsor would be expected and authorized to oversee and to manage all aspects of the contract including finances; to monitor and to implement program activities of subcontracting or partner agencies; to terminate contracts with subcontracting or fiscal partner agencies with the approval of the City of Oakland, if necessary; and to assume full fiscal responsibility of contract, subcontract, and fiscal partnership.

4. Each school site may participate in only one application for this RFQ. However, service providers, be they a CBO, a non-profit organization (NPO), and/or other private and public agencies, may participate in more than one application for this RFQ.

Service providers are allowed to apply under our general RFP for services not eligible for funding under this RFQ.

5. The lead applicant must have financial statements from the last two most recently completed fiscal years.
6. The lead applicant must submit a completed audit and independent auditor's report including cover letter and/or management letter on financial statements within the last three years. If the applicant is requesting \$75,000 or less and has an audit on financial statements within the last three years, that audit should be submitted.
7. The applicant, by submitting a proposal, authorizes OFCY to verify any and/or all information contained in the proposal.

OFCY has the right to disqualify applicants whose proposals provide false, inaccurate or incorrect information, or are incomplete in any fashion.

B. POST AWARD REQUIREMENTS

Award Amount

1. Although there is no minimum grant size, the minimum number of youth served must be 60. The maximum grant size depends on the number of proposed sites and youth served.
2. The amount an applicant requests may not necessarily be the amount awarded. The OFCY Planning and Oversight Committee (POC) is committed to funding

applicants at a level that allows them to perform the proposed scope of services. However, the POC reserves the right to lower the funding amount requested. The POC also reserves the right to increase funding of a particular program if it believes there is a significant opportunity to enhance the evaluation potential, ability for replication, or other benefit to the children and youth of Oakland.

3. Grant recipients will be required to document matching funds. Proof of matching funds may be demonstrated in the following ways:
 - ✓ Copies of 21st Century Learning and/or ASEP funding Contracts or Service Agreements, with a copy of any accompanying checks, bank statements, or payment schedules. Funds that are earmarked for other projects cannot be used as matches for OFCY-funded projects.
 - ✓ In-kind support can be demonstrated with a letter (on donor's letterhead) documenting the monetary value of the in-kind donation. For example, if a donor provided space at no cost to a grantee, a donor's letter could document how much it would have cost the grantee to rent that space at market value. The in-kind donor cannot be the grantee.
 - ✓ Grantees using volunteers in direct service staff capacities must be able to demonstrate what that volunteer time would have cost for the nature of the volunteer service provided (i.e. a spreadsheet documenting volunteer hours, volunteer sign-in sheets, etc.). Volunteers cannot be employed by a grantee's organization or be serving in a consultant or contractor capacity.
 - ✓ Copies of Letters of Support from foundations or private donors (on donor's letterhead), with a copy of any accompanying checks, bank statements, or payment schedules. Funds that are earmarked for other projects cannot be used as matches for OFCY-funded projects.
 - ✓ Grant recipients CANNOT use one OFCY grant as a match for other OFCY grants. For example, if a grantee has a \$150,000 grant with OFCY and is also a subcontractor on another OFCY grant for \$15,000, the subcontractor dollars cannot be used as a match on your \$150,000 grant. Further, a Collaborative cannot use an OFCY grant of one of its partners or subcontractors as a match.
4. OFCY and the City of Oakland have the right to modify the amount of funding awarded to a program in order to be consistent with the goals and guiding principles expressed in the OFCY 2002-2006 Strategic Plan and the entire funding package. To this end, OFCY may suggest partnerships and adjust requested grant amounts.

The *OFCY 2002-2006 Strategic Plan* may be downloaded from the Oakland Fund for Children and Youth website at www.ofcy.org.

5. OFCY and the City of Oakland reserve the right, after a contract is awarded, to amend the resulting contract as needed throughout the term of the contract to best meet the needs of all parties.

Required Documents and Assurances

Applicants must be able and prepared to submit documents and assurances, after funding is awarded, including but not limited to:

- ✓ Signed Contract
- ✓ Contract Data Summary Sheet
- ✓ Revised Scope of Work & Budget, as necessary
- ✓ Declaration of Compliance with Living Wage -- the City of Oakland requires that any contractor receiving \$100,000 or more from the City of Oakland, must pay employees at least \$9.58 per hour with benefits and at least \$11.02 per hour without benefits. The living wage is adjusted regularly for cost of living increases; these amounts are likely to increase based on cost of living by the time the contracts begin.
- ✓ Compliance with Equal Benefits, Declaration of Non-discrimination
- ✓ Campaign Contribution Form
- ✓ Insurance Certificate(s), endorsements, and waiver letters (if applicable)
- ✓ Independent Contractor Questionnaire
- ✓ Proof of 501(c)(3) status dated in the year **2001** or later
- ✓ Declaration of Corporate Status
- ✓ Business Tax Certificate
- ✓ Nuclear Free Zone Disclosure
- ✓ Declaration of Compliance with the ADA
- ✓ Applicants must comply with all existing local, state, and federal laws that prohibit discrimination based on race, color, national origin, age, gender, sexual orientation, or disability
- ✓ OFCY will provide any additional required forms to applicants selected for funding

Contract Negotiations

Scopes of work and budgets will be reviewed in detail and negotiated as necessary to ensure that they meet the goals, objectives and policies of OFCY and the Afterschool Initiative. Therefore, during contract negotiation, scopes of work and budgets may be revised.

Contract Compliance

1. After final funding recommendations are made by the POC, prospective grantees will be required to submit program and financial reports to the OFCY office on OFCY designated forms, and living wage reports to the Contract Compliance Office. All reports must be submitted on the due dates specified. The grantee will be expected to maintain thorough records related to the contract including attendance sheets, receipts, and other back-up documentation for progress reports and invoices.

2. Grantees will be expected to provide the services projected in the proposal and scope of work, subject to contract negotiations. Failure to provide these services may result in reduced payments or suspension of payment.
3. All OFCY grantees are expected to provide evidence for in-kind and cash matches at the end of the third quarter. This can be in the form of letters, copies of checks, grants, or records of volunteer or donated services, as appropriate.
4. Budget Modifications -- Grantees may request up to two revisions to the contract budget during the contract year. Contract modifications cannot exceed the total amount of funding approved by City Council. All requests to modify the contract budget or contracted service level must be APPROVED IN ADVANCE of implementation. Approval is granted only when provided in writing by OFCY.

Evaluation

Grantees are required to participate fully in the OFCY evaluation process so that meaningful data may be gathered to report to all parties interested in OFCY. Participation in the OFCY evaluation includes, but is not limited to attending trainings and workshops, gathering adequate data as determined by the evaluator on effort and results, and hosting site visits.

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V. FORMATTING REQUIREMENTS

This section is under construction and will be completed prior to release

VI. IMPORTANT DATES

⇒ Check www.ofcy.org or call (510) 238-6379

Request for Proposals (RFP) Released	November xx, 2003 TBA
Community Planning Meetings	TBA
Technical Assistance by E-mail Available	November xx, 2003 through January xx, 2004 (No E-mail T. A. between 12/23/03 and 01/04/04) mhart@oaklandnet.com
General RFP Technical Assistance Session #1	December xx, 2003 TBA
General Technical Assistance Session #2	December xx, 2003 TBA
Technical Assistance by E-mail Ends	January xx, 2004 No e-mail responses after 12:00 p. m.
Proposals Due	January xx, 2004 5:00 p. m.
Application Review Comments Mailed to Applicants	March xx, 2004
Preliminary List of Afterschool Programs Recommended for Funding Mailed to Applicants	March xx, 2004
Written Appeals from Applicants Due	March xx, 2004 5:00 p. m.
Final List of Programs Recommended for Funding Mailed to Applicants	April xx, 2004
Program Year Begins	July 1, 2004

Proposals received after 5:00 p. m. on Friday, January xx, 2004 will not be considered for review. This deadline will be strictly enforced.

A. COMMUNITY PLANNING MEETINGS

One Community Planning Meeting will be held in City neighborhoods. The purpose of the Community Planning Meeting is 1) to provide general information and guidance around applying to the RFQ and 2) to facilitate partnerships to apply in specified neighborhoods.

1. **North Oakland/Chinatown/Eastlake** - to be announced

2. **West Oakland/Downtown** - to be announced
3. **Laurel/Diamond/Piedmont/Redwood Heights** - to be announced
4. **Fruitvale/Central Oakland**- to be announced
5. **East Oakland, Brookfield, Elmhurst, Sobrante Park, Oakland Hills** to be announced

More information about the Community Planning Meetings will be announced on the OFCY website, www.ofcy.org and on the OFCY general telephone line, (510) 238-6379 soon after the release of the RFQ. Pre-registration is not required to attend the Bidders Conferences. OFCY staff will review the RFQ funding guidelines and answer any questions that may arise. All potential applicants are encouraged to attend one of the Bidders Conferences.

B. TECHNICAL ASSISTANCE

Two (2) Technical Assistance Sessions will be held. The dates for the Technical Assistance Sessions ~~are to be announced~~ and ~~are to be announced~~. The Technical Assistance Sessions will be held at the City and select community sites. More information will be announced on the OFCY website, www.ofcy.org and on the OFCY general telephone line, (510) 238-6379 approximately two weeks before the scheduled dates.

Technical Assistance by E-mail will be available between Xxx, November xx, 2003 and Xxx, January xx, 2004. For questions regarding the 2004-2005 RFQ, e-mail: Maya R. Hart, OFCY Program Planner at mhart@oaklandnet.com. Please note that there will be no e-mail T. A. between December 23, 2003 and January 4, 2004.

C. APPEALS PROCESS

After the OFCY Planning and Oversight Committee (POC) has approved a set of preliminary funding recommendations, applicants will be notified about the appeals process. Any applicant may appeal. Appellants will be notified in writing regarding the success of their appeal. The POC may amend the preliminary funding recommendations if necessary to fund successful appellants, and may reduce the budgets of proposals recommended for funding in the initial set of funding recommendations. At the conclusion of the appeals process, the POC will submit final funding recommendations to the Oakland City Council. The City Council has the authority to either accept or reject the entire package of recommended agencies.

D. SITE VISITS

Site visits or other verification of experience as a service provider may be conducted as necessary before a final determination is made regarding grant awards. Site visits may be conducted at anytime before a contract is issued.

VII. APPENDIX

Appendix 1

List of Eligible Schools

North Oakland

Carter Middle School
Claremont Middle School
Emerson Elementary School
Santa Fe Elementary School

Chinatown/Eastlake

Franklin Elementary School
**Garfield Elementary School
Lakeview Elementary School
Lincoln Elementary School
*Roosevelt Middle School

West Oakland/Downtown

Cole Elementary School, 4-8
Hoover Elementary School
Longfellow Elementary School
Lowell Middle School
Martin Luther King, Jr. Elementary School
Prescott Elementary School
West Oakland Community School
Westlake Middle School

Laurel/Dimond/Piedmont/Redwood Heights

Allendale
Bret Harte Middle School
Fruitvale Elementary School
Laurel Elementary School
Maxwell Park Elementary School
Sequoia Elementary School

Fruitvale/Central Oakland

Ascend (K-8)
International Community School
Manzanita Elementary School
Melrose School (K-8)
Urban Promise Academy

East Oakland, Brookfield, Elmhurst, Sobrante Park, Oakland Hills

Elmhurst Middle School
Frick Middle School
*Havenscourt Middle School
*Lockwood Elementary School
Madison Middle School
Markham Elementary School
*Sobrante Park Elementary
Stonehurst Elementary School

* ASESP funded ONLY

** Both ASESP and 21st Century funded
All other school are 21st Century funded
ONLY

Appendix 2

QUALITY STANDARDS

In October 2002, the Oakland After-School Coordinating Team adopted a set of quality principles that are to apply to every publicly funded after-school program in Oakland.

Those Quality Standards are that programs are:

- Are physically and emotionally safe
- Have developmentally appropriate activities
- Strive to be inclusive
- Encourage multiple supportive relationships
- Facilitate community involvement of children and youth

Physically and Emotionally Safe

Physically safe after-school programs have a staff member available to walk youth from school to the project site, or have a sign-in sheet for participants. Both indoor and outdoor spaces are free of obvious hazards, and play equipment is in good repair. If appropriate, youth are picked up by a parent or other adult to ensure their safety on the way home.

Programs for older youth may not supervise youth as closely as those that serve elementary school-aged youth. Instead, exemplary programs for older youth ensure that participants are safe from potentially dangerous situations or individuals while on site and help youth maintain their safety on the way to and from the program.

Emotionally safe after-school programs encourage youth to take risks and try new things within a supportive program culture. Staff members show a caring attitude toward youth and encourage youth to support and respect one another.

Developmentally Appropriate

Developmentally appropriate programs have activities and policies that take participants' age and experience into account. Staff members develop skill-building activities that call on different learning styles of participants and place youth into appropriate age categories. Youth are encouraged to suggest activities and to provide feedback. When appropriate, youth have the opportunity to take leadership roles in the program.

In rare cases, opportunities for youth input or leadership are limited. Developmentally appropriate programs in this situation work to ensure that youth are building the specific skills and competencies the program is designed to foster.

Inclusive

Inclusive programs are accessible by public transit or have made efforts to arrange for transportation for youth. Staff members are sensitive to the language and cultural backgrounds of participants, and encourage tolerance and acceptance among youth. Reasonable accommodations are made to enable disabled and language-minority youth to participate in the program. When appropriate, parents and caregivers visit and offer feedback.

Some after-school programs may not fit this model of inclusiveness. For example, programs may be in buildings that are inaccessible to people with physical disabilities, and modifications

to the space are infeasible. Alternately, programs that preserve the confidentiality of their clients (e. g. serving LGBT youth) will not encourage parental involvement.

Staff's cultural competency, connections with community

Parents and caregivers are encouraged to visit and to provide feedback on the program. Parental/caregiver visits are encouraged when appropriate, formal evaluation mechanisms exist for parents/caregivers, translators available on request

Facilitate Multiple Supportive Relationships

Programs that facilitate multiple supportive relationships are a place where young people receive guidance from caring adults and emotional and practical support from both adults and peers. Staff members are a consistent, supportive presence in youths' lives and participants demonstrate resiliency.

Some after-school programs, such as drop-in centers or one time projects, may not have the continuous contact with youth that is needed to build relationships. Exemplary programs in this situation strive to build a positive environment among youth in a short time and provide necessary support to staff to accomplish this goal.

Encourage Community Involvement

Programs that encourage community involvement create age-appropriate opportunities for youth to learn more about the greater community and, when appropriate, facilitate civic involvement and voluntarism.

Depending on specific circumstances, some after-school programs may focus almost solely on facilitating community involvement, while others may do so through occasional field trips or hosting.

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LIFE ENRICHMENT CMTE.
OCT 28 2003