

Request for Proposals

SmartSimple Online Management Platform

Application Instructions

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Registration

- 1. To start the registration process, navigate to www.ageguide.smartsimple.com
- 2. On the landing page, click the **Register** button underneath "New User?"



3. The next page requires the user to select an organization type. Applicants should select "Registered Non-Profit Organization" or "Government Organization"

Registration Options	× +	- 0 ×
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	AgeGuide	
	Registration Options	
	I am applying as:	
	Registered Non-Profit Organizations	
	Government Organizations	
	Individuals	

4. An Eligibility Quiz will appear. All applicants must complete this eligibility quiz to proceed to registration. Once you have made your selections, click "Submit". If you selected "Government Organizations" skip to step 7.



Eligibility Information

3 ,	
Pre-Registration Eligib	lity Quiz
Welcome to AgeGuide North questions to check whether	eastern Illinois Grants Management system. Before registering an account we would like to ask you a few you are eligible to receive support from us.
* AgeGuide grants are for county-wi	le services. Can your agency provide the service throughout the county applied for?
Select One	~
* AgeGuide grant recipients must pla income, limited-English-speaking, ar representation in the county?	ce special emphasis on providing services to under-served populations, racial and cultural minorities, and lov Id LGBTQ older adults. Can your agency serve underserved populations at least in proportion to their
Select One	\checkmark
* All Title III grants, except for III-D, r adequate match throughout the gran	equire a recipient match which may include both local cash and in-kind contributions. Can your agency provid t award period?
If your organization is not applying fo	r Title III funding, or is applying only for Title III-D funding, select "Not Applicable".
Select One	~
* AgeGuide grant recipients must of income adequately. Can your agency	er participants the opportunity to contribute to the cost of service, and must be able to track this program track and manage program income throughout the grant award period?
Select One	\checkmark
	Save Submit



5. If you selected "Non Profit," the next screen will be the Organization Search. SmartSimple maintains a database of nonprofit organizations, and can pull some data automatically into your organizational profile. Read the instructions on the page, complete the required fields, and click "Search." Do not include spaces when entering the EIN



Organization Search

	Enter your organization name (keyword search is sufficient, example: "Waco" instead of "The Waco Foundation") your organization EIN (do not include spaces or dashes, example: 123456789). Click "Search" Click on the name of your organization in the search results.	or Enter
EIN		0
Name		0
Address		
City		
State		0
	Search	

- 6. A list of matching organizations will appear. Click the name of your organization from the list.
- 7. The "Organization Information" page will appear. Complete all required fields and click "Submit."
- 8. You will receive an email address with a link to create a password and login. Once you have created your account, login with your new credentials.



Registration

Registration Complete

Your registration has been completed. You will receive an email with a link to create a password and login in the next 5 minutes. If you do not receive this email, please check your spam folder.

Login here

9. You may want to add multiple individuals to the same organization. The second employee will need to register and create a new profile using the same organization name. These individuals will then be able to contribute to the same applications in-progress.

Home Screen

When you log into your account, you will be taken to your "Home Screen."



Funding Opportunities: All of the available funding opportunities are show here. See below for detailed instructions for funding opportunities.

My Profile: Your profile as an individual user

Organization Profile: Your organization's profile. See below for detailed instructions about creating and maintaining your organization's profile.

In Progress: Applications that are in-progress are displayed in this section. Applications for funding do not need to be completed all at once. You can save and return to your applications at a later time.

Submitted: Applications submitted by your organization will show in this section. Once an application is submitted, it cannot be edited.

Approved/Declined: The status of each application will show in this section.

Progress Reports: This section will be used only if your organization is approved for grant funding. Here is where you will find any reports that are due from your organization throughout the year, such as the Grantee Monthly Expense Report, and the Quarterly Program Performance Report.

In Progress: Any reports due will show in this section. You will be able to save reports to work on at a later time.

Submitted: Completed reports will be found in this section.

Personal Profile

					Home	♣ B
Brianne Moser						>
* First Name:	Brianne	* Organizatio	on: Testing Organization 🔀			
* Last Name:	Moser	* Work Phone Number	er: 630-785-2352		-	
Title:		* Cell Phone Numb	er: 102-938-4756	:=	= JUMP TO	
* Email:	brianne.moser@gmail.com				Executive Dire	otor
 Executive Director 	pr					
* Executive Director First Name:	Marla	* Executive Director Cell Phone Number:	192-039-4857			
* Executive Director Last Name:	Fronczak	* Executive Director Work Phone Number:	192-837-4653			
* Executive Director Email:	mfronczak@ageguide.org					
		Save				

Your personal profile shows information for each individual user. Please ensure that your Personal Profile is up-to-date. This includes your name, email, phone numbers, and the contact information for the Executive Director at your organization.

Organizational Profile

An organizational profile must be created and maintained for all organizations. Multiple employees may be registered to the same organizational profile. Any profile associated with your organization may update the organizational profile. This information can be updated at any time. Please ensure this information was entered accurately for your organization.

AgeGuide					Home	≜ ₿	
Testing Organizati	on					> (i)	
* Organization Name:	Testing Organization	* Address:	111 Street Street				l
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		* Country:	United States		Other Information		I
		* State:	Illinois ~		Attaoninento		
		* Zip Code:	60000				I
✓ Other Information	n						l
* DUNS Number							ł
1650693020							
* SAM Registration							
456787643342354							
* Mission Statement							
To test the platform				<i>"</i>			
196 words left							
* Number of Employees							
26-50	~						
		Save					

The first part of the Organizational Profile will be created by the first user who generates an account for your organization. It contains your organization's address, website, DUNs number, SAM registration, Mission Statement, and Number of Employees.

AgeGuide	
Testing Organization Attachments 	
Please upload the Following Documents:	
* Upload most recent Audit	
* Upload list of current Board of Directors including term period	
* Upload Organization Chart	
* Upload BOD meeting minutes documenting approval to pursue AgeGuide RFP	
* Upload Cost Allocation Plan	
* Upload Staffing Chart	
* Upload Board of Directors ByLaws	

Save

The second part of the Organization Profile must be completed by uploading documents into the system. Your organization <u>must upload</u>:

- 1. Most recent audit
- 2. List of current Board of Directors including term period
- 3. Organizational Chart
- 4. BOD meeting minutes documenting approval to pursue AgeGuide RFP
- 5. Cost Allocation Plan
- 6. Staffing Chart
- 7. Board of Directors ByLaws
- 8. Risk Review

Applying for Funding Opportunities

Once you complete eligibility and set up your organizational profile, you will log in and find this home screen. To access the funding opportunities, click on the "Funding Opportunities" on the home page.

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				Home 🌲 📙
	V	Velcome Lucinda H	urt	
	14 Funding Opportunities	My Profile	Crganization Profile	
	11 In Progress	15 Submitted	1 Approved/Declined	
		Progress Reports	5	
	0 In Progr	ress Sub	O pmitted	

After clicking on the Funding Opportunities, you will see the screen below. Open funding opportunities will have the "Apply Now" button and closed opportunities will show "Deadline Passed." Click "Apply Now" on the opportunity you wish to apply for. Be sure to click on any documents associated with the application you are completing. Project Descriptions you will need to inform your application can be found as links, like the link in the IIIB Aging and Disability Resource Network application in the screen shot below.



For the purposes of this user guide, we will use the IIIB Community Connection Collaborative as an example application.

After clicking "Apply Now," the application will open. Review the instructions at the top of the page prior to starting your application. When you hit "Save Draft" your Organizational Information will prepopulate from your Organizational Profile. If this information is incorrect, make sure to go back to your home screen to update your Organizational Profile information.

Before clicking "Save Draft"

ageguide.smartsimple.com/iface/ex/ax_index.jsp?lang=1 Age**Guide** Home New Grant (i) a Please complete the questions in each of the tabs below. * represents a required field . Use the NEXT button in the bottom right corner of the screen to advance to the next tab. Use Save Draft button to save your answers. . Use the Submit button only once you have completed all tabs. · Some of information is copied directly from your organization and user profiles and will appear in a read-only state within this form. If the information displayed is not current, please update your organization and user profiles prior to completing and submitting this form. If you wish to communicate with staff regarding your application, use the Notes tab located within the left side menu. · You can view your responses by clicking on the Application Summary button. CONTACT INFORMATION OUTREACH AND COORDINATION WITHIN THE C > PROGRAM PLANNING **PROGRAM DESIGN & DELIVERY** PROGRAM OPERATIONS PERFORMANCE EXPERIENCE AND CAPACITY 1 • Select the Save Draft button below to review your contact information. See Application Instructions above if information is not correct. Draft application must be saved prior to uploading documents. **Organization Information** NEXT > Save Draft

After clicking "Save Draft"-Notice that the Organizational Information is completed based off the information in the organizational profile.

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You can now proceed to completing the application. Next to the "Contact Information" are the following Tabs:

- **1.** Program Planning
- 2. Program Design and Delivery
- 3. Program Operations
- 4. Performance Experience and Capacity
- 5. Outreach and Coordination within the Community
- 6. Budget

7. Additional Documents

8. Certification

To Navigate to the next tab, you can click on the tab header or click "Next" in the bottom right corner of the page.

Program Planning: For packages, where there are optional services, chose the service(s) you wish to apply for in that package. Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.

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	Closed as program(s) you organization wants to apply for Closed as program(s) you organization wants to apply for	
	* Which county where your organization provider services	
	DuPage * Describe how your organization utilizes current demographic information, data and relevant research in order to maximize the number of persons your services will provided to older adults in greatest economic and social need as outlined in the above Statement on Serving Populations in Greatest Economic and Social Need	reach and to ensure your services are
	Example for the guide.	1
	* Describe how your organization will reach and provide services to those in greatest economic and social need as outlined in the Statement on Serving Populations in Greatest Economic and Social Need	
	Example for the guide.	
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Program Design and Delivery: Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.

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Notes	2021-ITTP INB COMMUNITY CONNECTION COIRDORATIVE	VENTS CERTIFICATION
	* Describe your organization's plan to provide the proposed services. Include when and where (locations, times, days of week) and how (methods of delivery) the service will be delivered and by whom. In addition, describe how your agency has been successful in engaginabove and is a trusted and respected source for these populations Example for the guide	g target populations as defined
	* Describe how participant information and documentation will be maintained, including methods to ensure confidentiality of all records. New applicants: provide a sample data collection form (e.g. Intake Form) or describe the types of participant data to be collected	12
	Example for the guide	li li
	Upload a sample data collection form (e.g. Intake Form)	
	* Describe how your organization would adjust program design and delivery in the event of a natural disaster and/or pandemic	
	Example for the guide	
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Program Operations: Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.

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	 If you wish to communicate with staff regarding your application, use the Notes tab located within the left side menu. 			
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	* Describe your plan for staff (and if applicable, volunteer) screening, training, supervision and retention for the proposed services			
	Example for guide			
	* Describe your process to evaluate service delivery, including participant satisfaction and outcomes. Explain how program adjustments will be implemented based on results. Describe a scenario where your organization used feedbac services	k to improve	programs	and
	Example for guide			
	* Describe how your organization provides services that are culturally competent and responsive to diverse populations, including your plan to provide barrier-free access to inquirers who speak languages other than English; inquirers impairments; and for persons with disabilities at the facility (or facilities) where the proposed services are provided	with hearing a	or speech	1
	Example for guide			

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NEXT >

Performance Capacity and Experience: Review this question, specific to current and new grantees. There are no questions for this tab. New grantees applying for this service will need to upload letters of recommendations. To upload letters, click on

<u>1</u> in the bottom left corner under "Upload Letters of Recommendation." the upload button

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	Proceeding of the proposed service and past performance of applicants, including the degree of experience the provider has in the proposed area, the organization's capacity to provide oversight of the project and the organization's capacity for the proposed service do not need to submit a response to this question. AgeGuide will review internal data to evaluate current and past performance of applicants who have current funding from AgeGuide for the proposed service do not need to submit a response to this question. AgeGuide will review internal data to evaluate current and past performance of the proposed service of the proposed service should submit letters of recommendation/reference showing that the applicant organi contract requirements from another funding source. The letters must specifically address timeliness and accuracy of fiscal reports and program reports; the proposed service in the proposed service area; whether applicant met or exceeded projections for units and clients, whether applicant met or exceeded grant or contract requirements related to compliance; and overall performance the grant or contract. AgeGuide also will look at the applicant's experience fulfilling other. Title III grants through AgeGuide	lity to submit and maintain ce in meeting standards a; and performance findings zation has met grant or ant has a history of providing ce in meeting standards of
	Upload letters of recommendation	
	< BACK	NEXT >
	Save Draft Submit Submit Withdraw	

Chose a document from your computer to upload via the browse folder in the pop up window or drag and drop the file. Once the file is uploaded, you will see the screen below. Follow the same steps to upload multiple documents. When finished, click the "x" at the top right hand corner. Click "Save Draft" and proceed to the next tab by clicking on the next tab or clicking "Next" in the bottom right hand corner.

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	Upload letters of recommendation				
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	FY20-PID-final.pdf	1.7 MB 03/18	/2021 9:59	PM :	
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Outreach and Coordination within the Community: Answer the questions on the page, click "Save Draft" and then proceed to the next tab by clicking on the tab or "Next" in the bottom right corner.

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	C ERY PROGRAM OPERATIONS PERFORMANCE EXPERIENCE AND CAPACITY OUTREACH AND COORDINATION WITHIN THE COMMUNITY BUDGET ADDITIONAL DOCUMENTS * Describe how you plan to maintain a physical presence in the county, including the public awareness efforts your organization will undertake to assure that older adults, those caring for them about the proposed services and how to access them * Describe how your organization will coordinate with other service providers in your community							
	< BACK	// NEXT >						
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Budget: Click in the middle of the screen on the link to the budget. In this application it says <u>IIIB Budget</u>. The budget template will download to Excel. Once completed, click on the upload button and upload the complete budget back to SmartSimple.

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	CATEGORY Information Outreach Options Counseling Transportation Legal Counseling Education Health Screening Recreation Friendly Telephone Targeted Flexible Special PAGE Visiting Reassurance Outreach Comm Services Project TOTALS		NEXT	•

Once the budget is uploaded, click "Save Draft" and you will see the budget populate on the page. You must do this before submitting the application.

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2021-1119 IIIB Community Connection Collaborative

CATEGORY & LINE ITEM	Information & Assistance	Outreach	Options Counseling	Transportation	Legal	Counseling	Education	Health Screening	Recreation	Friendly Visiting	Telephone Reassurance	Targeted Outreach	Flexible Comm Services	Special Proiect	PA TOT
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TRAINING/EDUCATION	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	s	0 \$1	\$0	\$0	
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Once the budget is completed, uploaded and has been populated, proceed to the next tab by clicking on the tab or clicking "Next" in the bottom right corner.

**You can proceed to the next page without completing the budget, however, the application cannot be submitted without the budget being uploaded or populated.

Additional Documents: Upload any other additional documents relevant to the application. These documents may include information requested on other pages or documents the applicant feels appropriate to support the application. Once documents are uploaded, proceed to the Certification Tab by clicking on it or clicking "Next" in the bottom right corner.

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Certification: Review the certification, click agree and the agency director enters his/her name and click "Submit."

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	I certify that the statements herein are tru civil or administrative penalties. (U.S. Co	ue, complete and accurate to the de, Title 18, Section 1001)	best of my knowledge. I agree to comply with any re	esulting terms if I accept an award. I am aware that any false, fictition	is, or fraudulent statements or claims may subje	ect me to criminal,
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	* Signature, Applicant Agency Director					
	Jane Smith					
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Submission Errors: For reference-if you click submit and have information missing, you will receive an error message informing you of which information is missing. As you go back to correct errors, the errors messages will disappear.

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Once you hit submit, you will see a pop up window confirming you want to continue. Click "Yes" if you are ready to submit your application.

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Submission Confirmed: Once you have officially submitted your application you will see the screen below. Click "Home" to return to the home page where you can review and complete other applications.

Submission Successful	
Application submitted successfully.	
A Home	

In addition, you will receive an email confirming receipt of your application. Please check your "junk" folder for this notice.

From: <<u>noreply@smartsimple.com</u>> Date: Thu, Feb 25, 2021, 4:15 PM Subject: Application Received To: <<u>brianne.moser@gmail.com</u>>

Dear Brianne,

We have received your final grant application. Please see the attached PDF for a summary of the information submitted. We will be reviewing the application and will notify you should you be asked to proceed.

Best regards, AgeGuide Northeastern Illinois Grants Management

Notice of Funding Decision

Applicants who are approved for funding will receive an email notice generated from SmartSimple. These emails will arrive from the address <u>noreply@smartsimple.com</u>. Please be sure to check your "junk" folder throughout the RFP process, as the emails may be sent there.

Following the email notice, an official Notice of Grant Award will be sent to approved applicants. This NGA will contain detailed award information and terms. NGAs will be sent through the AdobeSign platform. Applicants will be required to digitally sign and return this NGA.

Should your application be declined, you will receive communication directly from AgeGuide.

From: <<u>noreply@smartsimple.com</u>> Date: Thu, Feb 25, 2021, 4:15 PM Subject: Application Approved To: <<u>brianne.moser@gmail.com</u>>

Dear Brianne,

It is my pleasure to inform you that we have approved a \$86,810.00 grant to Testing Organization for 2021-1117 IIIB Legal, as outlined in the application provided to us. A grant agreement is forthcoming. In the interim, should you have any questions, please contact <u>bmoser@ageguide.org</u>.

We wish you every success with your important work, and look forward to hearing the results.

Sincerely,

AgeGuide Northeastern Illinois Grants Management