

August 15, 2019

City of Coalinga, Planning Department  
Sean Brewer, Community Development Director  
155 W. Durian  
Coalinga, CA 93210

Subject: Request for Qualifications for Grant Writing, Researching, and Consulting Services

Blais & Associates, Inc. (B&A) is pleased to provide the City of Coalinga with the following response to the Request for Qualifications for Grant Writing, Researching and Consulting Services and requests the evaluation of our response. As required, five bound copies of the response and one electronic copy on a Flash Drive are included herein.

B&A is a full-service grant consulting firm providing grant research, development, and post-award management services to local municipal government agencies for nearly 19 years. B&A is a woman-owned business enterprise and will utilize internal staff for the presentation of services from our California office, with oversight and guidance from our Texas headquarters.

As the signor of this letter, I attest that the information presented in this proposal is true and correct. I will serve as your point of contact with respect to reviewing and executing any potential agreements. B&A proposes Ms. Jill Mohler as the Lead Associate responsible for coordinating potential projects with the City.

All statements in this proposal, including the cost proposal, remain valid for 90 calendar days from the submission date. B&A has reviewed the sample professional services agreement and accepts the terms and conditions without objection.

If you need additional information please do not hesitate to call me at (949) 589-6338, or via e-mail at [nblais@blaisassoc.com](mailto:nblais@blaisassoc.com). Thank you for the opportunity to serve the City of Coalinga.

Sincerely,



President & CEO

Enclosure: Proposal Response

NB/db

Response to Request for Qualifications  
City of Coalinga

# **Grant Writing, Researching, and Consulting Services**



**B&A** | Professional  
Grant  
Consulting

Irvine Business Center  
7545 Irvine Center Drive, Suite 200  
Irvine, CA 92618  
(949) 589-6338

Due: August 15, 2019, 5:00 PM

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# EXECUTIVE SUMMARY

Blais & Associates, Inc. (B&A) is pleased to provide this response to the Request for Qualifications (RFQ) for Grant Writing, Researching, and Consulting Services. B&A is a full-service grant consulting firm and is celebrating 19 years of providing grant research, writing, and management services to municipal government agencies and regional agencies, including water districts and council of governments. **B&A's client retention rate is almost 100 percent** with our very first **annual contract** client, Chino Hills, California, still active and utilizing our services since 2005. We attribute this success to our commitment to client satisfaction, training our staff to exacting standards and hiring associates who are passionate about professionalism and possess the technical skills required to be successful. B&A will follow our standardized process, as written in our internal Corporate Policies and Code of Conduct Manual, for providing grant research, writing, and consulting services to the City of Coalinga.

Since inception, B&A has submitted over 1,000 different types of grant applications representing requests for approximately \$1.4 billion on behalf of our clients. B&A has submitted transportation, water, wastewater, storm water, recreation, parks, cultural, education, historic preservation, public safety, economic development, planning, environmental protection, library, museum, and homeland security grants, among others. B&A has provided grant writing services for Coalinga since 2013 and has developed 17 grant applications for the City, winning 13 applications for a total of approximately \$6.9 million dollars. Table 1 provides a listing of those applications.

TABLE 1 COALINGA GRANT EXPERIENCE

Date	Grant Program	Project Description	Funding Awarded
2018	Fresno COG Active Transportation Program	Coalinga Perimeter Multi-use Trail Project	\$885,000
2018	Fresno COG Regional Surface Transportation Program	Polk Street Rehabilitation Project	\$396,000
2017	San Joaquin Valley Air Pollution Control District Public Benefits New Alternative Fuel Vehicle Program	T3 Patroller Standup Vehicles for High School Campuses	\$25,289
2017	Fresno COG Congestion Management and Air Quality Improvement Program	West Coalinga Multi-use Trail	\$461,000
2016	Caltrans Active Transportation Program	Sidewalk Gap Closure and Pedestrian Improvement Project	\$1,109,000
2016	California Transportation Commission Active Transportation Program Safe Routes to Schools	Safe Routes to Schools Sidewalk and Pedestrian Improvements Project #1	\$1,284,000
2016	Fresno COG Regional Surface Transportation Program	Forest Truman Reconstruction Project	\$600,000
2016	Fresno COG Congestion Management and Air Quality Improvement Program	Pavement and PM-10 Mitigation	\$531,180

Date	Grant Program	Project Description	Funding Awarded
2015	Caltrans Safe Routes to Schools	Multi-school Safe Routes to School	\$323,000
2015	California Transportation Commission Active Transportation Program	Sidewalk Gap Closure and Pedestrian Improvements Project #2	\$323,000
2014	Caltrans Active Transportation Program	Active Transportation Plan	\$240,000
2014	Caltrans Sustainable Communities Transportation Planning Grant	Vehicular Traffic Calming and Safety Enhancements Plan	\$221,325
2014	Fresno COG Regional Surface Transportation Program	Forest Avenue Reconstruction Project	\$563,683
Denied Applications			
2018	Caltrans Active Transportation Program	Perimeter Multi-use Trail Project (Funded by the COG)	
2013	Fresno COG Regional Surface Transportation Program	Sunset Street Rehabilitation Project	
2013	Fresno COG Regional Surface Transportation Program	Polk Street Rehabilitation Project (Funded in Later Application)	
2013	Fresno COG Regional Surface Transportation Program	Coalinga Street Rehabilitation Project	

B&A currently has 21 associates distributed among our offices in California (9), Texas (7), Colorado (1), New York (1), North Carolina (1), Oklahoma (1), and Kansas (1). B&A currently serves multiple cities in the central valley. We look forward to expanding our services to the City of Coalinga. Our contracts range from simple and small dollar to the most complex and high dollar agreements in the grant industry. B&A is pleased to provide contact information for key staff should B&A be successful in our pursuit.

TABLE 2 KEY PERSONNEL FOR B&A TEAM

Key Personnel	Contact Information	Function
Neil C. Blais	<a href="mailto:nblais@blaisassoc.com">nblais@blaisassoc.com</a> P: (949) 589-6338	Contract negotiations, Finance, Insurance, etc.
Jill Mohler	<a href="mailto:jmohler@blaisassoc.com">jmohler@blaisassoc.com</a> P: (949) 589-6338	Lead Associate, primary contact, coordination of staff and development of applications.
Adrienne Harrington	<a href="mailto:aharrington@blaisassoc.com">aharrington@blaisassoc.com</a> P: (949) 589-6338	Development of application narrative and materials. Backup for Jill Mohler.

We look forward to sharing more about our proposal and invite you to ask questions or seek clarification as you move through the evaluation process. Thank you for the opportunity to work with the City of Coalinga.

# INTRODUCTION

**B&A's mission and sole purpose is grant consulting.** We are not an engineering firm that added grant assistance as an add-on feature, we are not a community engagement firm with some level of grant experience, and we are not a lobbying firm with a grant expert on staff.

While licensing is not required for grant consultants, B&A believes in maintaining and promoting professional standards. Our memberships include the Grant Professionals Association (GPA), the National Grants Management Association (NGMA), and the American Grant Writers Association (AGWA). B&A holds to, and maintains, the code of ethics promoted by these three organizations and we are committed to providing the highest quality services to Coalinga.



## SERVICES OFFERED

It is important to note that B&A provides our services on a cafeteria basis, allowing each client to tailor services to meet their individual grant program needs and budget. These services include:

### GRANT RESEARCH AND SUPPORT

B&A has dedicated staff who research and identify grant opportunities. This team has a systematic process to find grant solicitations at the federal, state, regional, and local level. When a grant is identified that would be of interest to a B&A client, the research team develops a Fact Sheet, which is an executive overview of the program. B&A attends any workshops or webinars offered by the agencies. Typically, costs for a client may run between \$1,000 - \$2,000 per month depending on the City's consulting needs.

### DEVELOPING AND SUBMITTING GRANTS

Upon request, B&A will develop a Not-to-Exceed quote that outlines the tasks necessary to complete the application, time and cost for each task, and the level of effort assumptions. When Notice-to-Proceed is issued, B&A develops a Timeline and Checklist (T&C) document. B&A's detailed process ensures successful collaboration and timely submission. Throughout the grant development process, B&A will work as independently as possible but also closely with staff to ensure continued communication throughout the proposal development process. A typical mid-complexity grant application (about 25 pages of narrative) takes about 75 hours to complete or about \$8,000 - \$9,000 depending on any direct costs.

### GRANT MANAGEMENT

Management of your grant or loan program is a priority at B&A. It is extremely important that opportunities and deadlines are not missed while at the same time making sure grant awards are properly managed. Coalinga is more likely to receive grants from a funding agency a second or third time if staff maintain a

solid track record in managing funds (e.g., no major audit findings, timely completion of projects, etc.). Grant management services include the following:

**Debriefings:** If a grant is denied, B&A will coordinate with staff and the grant agency to request a debriefing. Debriefings are typically extremely valuable because they allow the funding agency to define why the grant was denied and offer recommendations on how to strengthen the proposal for the next grant cycle. This cost is typically included in the Grant Support charges.

**Post-Award Management:** B&A provides post-award management, reporting and close-out services. This effort includes working with staff to review the grant/loan agreement, tracking reporting requirements, request for reimbursements or drawdown requests, project reporting, and project close-out. B&A provides the City with an Audit Binder that contains information needed for the single audit. B&A developed a grant and loan management software program that streamlines the grant/loan management and project management process and enables B&A clients to log in to the portal and view up-to-the-minute data about their grant or loan. The software is extremely unique in that it is designed to be a "one-stop system" meeting the needs of a variety of personnel including engineers, project managers, finance, auditing, compliance, and executives. The typical cost for managing a grant averages approximately \$17,000/year.



**FIRM EXPERIENCE**

B&A has developed detailed written procedures related to researching grant programs, grant application development, and post-award management. These proprietary processes and procedures have been developed over years of service to local government clients. Associates are trained on the procedures and work for up to one year under a Lead Associate (LA) prior to being allowed to directly support a client. With respect to similar work, the proposed consulting services for Coalinga are similar to those provided to all of our full-service clients. The structure of our delivery can be tailored to the client’s specific needs, but the internal processes and procedures remain the same.

The best testament of our experience is with funding agencies. Table 3 below notes the funding that B&A has secured from a non-exhaustive list of agencies that might be of interest to the City of Coalinga.

TABLE 3 EXPERIENCE WITH GRANT AGENCIES (NOT COMPREHENSIVE)

Funding Agencies	Applications	Awarded Funds
<b>Federal Agencies</b>		
Department of Transportation; Federal Highway Administration	41	\$6,095,930
Department of Transportation; Federal Transit Administration	13	\$5,712,892
Economic Development Administration	4	\$3,626,853
Institute of Museum and Library Services	2	\$441,100
Department of Interior; Bureau of Reclamation	67	\$17,150,762
Department of Housing and Urban Development	7	\$8,440,380
Department of Homeland Security; FEMA	40	\$11,415,938

Funding Agencies	Applications	Awarded Funds
<b>California Agencies</b>		
California Department of Transportation (Caltrans)	168	\$97,765,925
California Energy Commission (CEC)	18	\$2,255,869
California Natural Resources Agency (and State Parks)	107	\$29,857,446
California Office of Emergency Services (CalOES)	26	\$9,648,834
California State Water Resources Control Board	30	\$90,795,379
California Transportation Commission	15	\$17,062,518
Strategic Growth Council	27	\$45,680,750
California Housing and Community Development	17	\$8,020,100
California Department of Water Resources	19	\$19,180,738
Mobile Source Air Pollution Reduction Review Committee (MSRC)	24	\$4,481,546
<b>Regional Agencies</b>		
Fresno County Council of Governments	9	\$3,436,863
San Joaquin Valley Air Pollution Control District	3	\$112,116
Tulare County Council of Governments	4	\$3,845,698
<b>Other Sources</b>		
Foundations and Private Entities	89	\$1,521,661

**Expertise with Administration/Compliance/Requirements with Special Capital Project Funding.** The RFQ specifically requests information about relative experience with the *administration, compliance, and requirements* associated with special capital project funding resources (e.g. CMAQ, STBG, and CDBG, to name a few) and also requests experience with health and recreational services grants through public or private funding. Because the RFP specifically mentions these consultant requirements, B&A is providing the following as evidence of meeting and exceeding these requirements:

- Thirteen Years of Administration/Compliance Experience.** B&A’s grant administration and compliance experience began in 2007 when the California State Parks referred the City of Farmersville, CA to B&A to help this small community save two park grants (2000 and 2002 RZH) that were at risk of being rescinded. B&A’s staff immediately tackled the “out of compliance” items and brought both grant-funded projects to a successful completion and close-out. This was the beginning of providing grant administration and compliance services to our portfolio of clients.
- Eighty+ Awards – most for Capital Projects.** B&A has provided administration/compliance services for almost 80 grant-funded projects and programs with **95% of the grants awarded for capital projects**. These capital projects primarily consist of transportation, water, and recreation/parks. The funding sources are varied and include: U.S. Department of Transportation that flows through the California Department of Transportation (Caltrans) to include Congestion Mitigation and Air Quality (CMAQ) funds and Surface Transportation Block Grant (STBG) funding, the U.S. Department of Housing and Urban Development that flows through the California Department of Housing and Community Development to include Community Development Block Grant (CDBG) funds, U.S. Environmental Protection Agency funds that flow through the California State Water Resources Control Board, and California State Parks, to name a few.

The largest grant award for a capital project currently being managed by B&A is \$72 million (to construct a wastewater facility). The smallest capital improvement grant-funded project managed by B&A was \$42,000 (to plant trees).

- **Grant Management Dictates Eye Towards Project Management.** Because grant management (compliance and administration) is so closely tied to the delivery of a successful project or program, B&A grant management staff have extensive experience managing multiple team members who are responsible for project or program delivery. This translates into a strong grant management team who can speak the capital improvement language and drive team members to action in order to stay compliant with critical grant deadlines). B&A routinely hosts monthly “check-in” calls with entire project teams to check on the schedule, budget, cost-overruns, compliance, and reporting, to name a few.
- **Federal and State Rules and Regulations.** Each federal or state grant award comes with a set of rules, regulations, and policies. B&A quickly identifies all governing documents when a new grant is awarded and develops a comprehensive Compliance Checklist that lists, one-by-one, each rule, regulation, and policy that must be adhered to during the grant’s performance period and beyond. B&A has extensive experience with several “rules and regulations” documents and topics including 2 Code of Federal Regulations 200 – Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, **Caltrans Local Assistance Procedures Manual to include the E-76 process**, EPA American Iron and Steel Requirements, Prevailing Wage (both federal and state) requirements, the Federal Transit Administration’s Buy America Requirements, federal and state procurement requirements, and Federally Suspension and Debarment. There are several other subject matter areas too numerous to list herein. B&A is not asserting that it is an expert in each of the topics listed above but does have extensive experience working with project team members who are responsible for said topic area and therefore can “speak the language” and provide oversight as it relates to ensuring grant compliance.
- **Health and Recreation.** B&A has a long history of successful health and recreation grant pursuits please Table 1 for a summary of grant awards from the California Natural Resources Agency and State Parks. We take great pride in our relationship with the California State Parks as a trusted consultant that receives call backs and happy greetings at workshops. In fact, it is not uncommon for a new client to call B&A asking for assistance based on the recommendation of a staff member at California State Parks. In addition, two out of the three city-managed public health agencies in the State of California are B&A clients – the Long Beach Public Health Department and the Pasadena Public Health Department (PPHD) Health-related grants can be some of the most challenging and complex grant applications in the industry and B&A routinely delivers winning proposals for both of these health agencies. For the PPHD, B&A has secured \$23.5 million via 19 different grants since 2012. PPHD has received \$55 in grant funding for every \$1 spent on grant writing services/cost.
- B&A subscribes to the **Foundation Directory**, the nation’s most trusted on-line portal for private funding and has been successful in securing private sector funding for several recreational projects and programs. Examples include (not exhaustive):
  - Vitamin Case Consumer Settlement Fund - \$100,000 to purchase mobile recreation vehicle
  - AARP Community Challenge Grant - \$9,671 to encourage residents to walk 1 million miles in 365 days

- National League of Cities Mayor’s Childhood Obesity Prevention Award - \$120,000 to purchase mobile recreation van
- U.S. Soccer Foundation - \$50,000 to install lights at soccer field
- California Endowment - \$30,000 for community outreach for sports park design
- Henry W. and Ellen R. Warne Family Foundation - \$100,000 to acquire open space park
- BNSF Foundation - \$5,000 for after-school program
- Wells Fargo/National Fish and Wildlife Foundation - \$40,000 for water conservation garden
- Wells Fargo/National Fish and Wildlife Foundation - \$36,805 for planter boxes
- Wells Fargo/National Fish and Wildlife Foundation - \$40,000 to plant 80 trees
- Christopher and Dana Reeve Foundation - \$11,000 to purchase sports wheelchairs
- Fireman’s Fund - \$6,000 to purchase AEDs
- California Wellness Foundation - \$120,000 to hire part-time dentist for senior exams
- Fresno Regional Foundation - \$35,000 to construct stage at community center
- Fresno Regional Foundation - \$9,750 for senior meal program
- Kaiser Permanente Foundation - \$25,000 for street team program (at-risk youth)
- With respect to **grant writing**, B&A’s awards specific to the topics identified include \$4 million in CMAQ funding, \$1.1 million in STBG funding, and \$130,000 in CDBG funding for various clients.
- **Certifications & Trainings.** And finally, the B&A grant management team has extensive training and certifications, these include:
  - Caltrans Federal Aid Series.
  - Caltrans A&E Consultant Contracts Webinar.
  - U.S. EPA Webinar: AIS Requirements for State Revolving Funds.
  - In study for Certified Grant Management Specialist through National Grant Management Association (Ursula Drake).
  - Texas Department of Agriculture, TxCDBG Certified Administrator Certification.
  - TxDOT Local Government Project Procedures Qualification #61531 to manage/administer TxDOT grants.
  - National Grant Management Association Webinar: The Data Driven Future of Federal Grant Reporting.
  - Grant Professional Association Webinar: Got the Grant, Now What?

# PROJECT APPROACH

As previously stated, B&A will follow our standardized process, as written in our internal Corporate Policies and Code of Conduct Manual, for providing grant research, writing, and grant management services to Coalinga. To our knowledge, we are the only professional grant consulting firm in the nation that has taken the time to codify our internal processes and train staff to specific standards. We also have a structured training program that includes internal mentoring for at least 12 months prior to releasing an associate to be the lead for any client or project. Our systematic approach is outlined below.

## FUNDING NEED ANALYSIS

**Needs Assessment and Grant Strategy.** B&A's first approach for grant research and writing is to conduct a needs assessment, which allows B&A staff to gain insight into the programmatic needs of the City. This can be accomplished with an on-site meeting with key staff and leaders. B&A will utilize the needs assessment during grant research, which in turn will enable effective and targeted research for Coalinga.

**Changes to Funding Priorities.** Monthly, B&A updates the needs assessment (also called the "wish list") during a Grant Activity Report (GAR) conference call with department staff. B&A recommends a monthly standing conference call (no more than 30 minutes) discussing open and active grant opportunities and potential projects. Along with the monthly GAR call, B&A maintains a comprehensive information file with information about the City, its projects, department budget, current grants being managed, organizational chart, administrative documents (e.g. staff report writing guidelines), calendar of meetings, applicable Flood Insurance Rate Maps, County map, general demographics, historic preservation data, Capital Improvement Program, Strategic Plans, and Federal and State Advocacy Programs, etc.

Annually, B&A leadership will meet one-on-one with city leadership and staff to capture higher-level goals and objectives. In addition, B&A regularly tours project sites to understand the history of a project and the future vision.

**Annual Roll-up Report with ROI:** B&A will provide an executive level Annual Roll-up Report designed to give Coalinga staff updates about the grant program accomplishments and return on investment (ROI).

**Strategic Outreach.** Without hesitation, B&A staff are trained and encouraged to use all available resources to be competitive and help clients win. That is the ultimate goal. Working with funding agencies to learn more about their preferences and priorities is sometimes a critical path item for grant writing. When appropriate, B&A coordinates with relevant agency staff to pre-position projects and ensure a submission is being crafted as competitively as possible. For example, when the California Department of Transportation staff host local or regional workshops where project ideas can be reviewed with State staff, B&A coordinates and attends these in-person meetings and will encourage Coalinga staff to attend as well.

**GRANT FUNDING RESEARCH**

**Actively Identify Grant Resources.** B&A’s grant research team tracks and identifies grant opportunities utilizing a systematic, daily, process to find grant solicitations at the federal, state, regional, and local level. The research team in turn develops a Fact Sheet and attends workshops or webinars. The Fact Sheet routinely provides the name of the funding agency, level of funding available, historic average awards for the program, due dates, eligible and ineligible projects or activities, program summary, and other critical details. In addition, our membership in the League of California Cities provides us with up-to-date knowledge regarding issues facing cities. B&A also watches propositions and legislative activities to understand the potential impact on our clients and grant programs. Our two primary research team members have both been with B&A for over 10 years and have honed the research department’s efforts to be efficient and thorough. B&A uses the following methods to keep informed on current opportunities and to search for specific grants:

- **Grant Calendar.** One of B&A’s strength is our understanding of federal, state, and regional grant programs and their funding cycles. Most grant programs are cyclical. At a glance, we can match your needs with the grant calendar to ensure we take advantage of the more common annual programs.
- **Federal Funding.** Daily, B&A monitors the federal government’s web portal for grant announcements. The portal lists every grant announcement issued by federal agencies.
- **State Funding.** B&A maintains a comprehensive list of all state agencies and their grant portals. Daily, the sites are monitored for new grant notices. B&A also stays current on bond measures or propositions that are passed through the general election process. The funding provided for through bond measures are summarized and will be communicated so projects can be identified and positioned as early as possible.
- **Foundation Funding.** B&A receives weekly the “RFP Bulletin” via electronic mail from the Foundation Center, which is the nationally recognized portal for all foundation and not-for-profit funding nationwide.

FAST FACTS	
1	<b>Deadline</b> August 5, 2019. U.S. Postal Service postmark accepted.
2	<b>Workshops</b> Multiple workshops will be held across the state. Please visit <a href="http://www.parks.ca.gov/pages/1008/files/SPP_Application_Workshops_1.23.2019.pdf">http://www.parks.ca.gov/pages/1008/files/SPP_Application_Workshops_1.23.2019.pdf</a> for the workshop nearest you. RSVP to Luis.Saldana@parks.ca.gov with your desired date and location.
3	<b>Eligible Applicants</b> Cities, Counties, districts (as defined on page 71 of the guidelines) JPA (one member of the JPA must be an eligible district, City, or County), non-profit with 501(c)(3) status. Applicants may submit multiple applications for different parks.
4	<b>Purpose of Program</b> Create new parks and new recreation opportunities in critically underserved communities across California.
5	<b>Success Rate Last Year</b> Not applicable as this is new funding.
6	<b>Authorizing Resolution Required?</b> Yes
FUNDING INFORMATION	
7	<b>Total Funds Available</b> \$254,942,000. 20% will be awarded to projects that expand or renovate existing parks.
8	<b>High, Low, Average Grant</b> Not applicable as this is new funding.
9	<b>Maximum Funding Request</b> Per application/park - Maximum: \$8.5 million. Minimum: \$200,000
10	<b>Local Match Required</b> Not required.
11	<b>Funding Cycle</b> There will be future rounds to award an additional \$395,333,000.
PROJECT INFORMATION	
12	<b>Examples of Funded Projects</b> Not applicable as this is new funding.
13	<b>Priorities</b> Disadvantaged communities.
14	<b>Eligible Project Types</b> A project must involve either development or a combination of acquisition and development to: • Create a new park, or • Expand an existing park, or • Renovate an existing park.  All projects must create or renovate at least one recreation feature. Examples of recreation features include but are not limited to the following: • Acquisition of land:

**Fig. 1.** Example of B&A Fact Sheet (not entire report)

- **Local Funding.** There are several regional agencies such as the Fresno COG and San Joaquin Valley AQMD that have funding programs. These opportunities are tracked as well.

**Pro-Rata Share for Grant Research.** Should the City of Coalinga utilize our grant research services the City will receive the benefit of early notification. This is a real advantage compared to agencies that are doing the research on their own. Another key benefit of B&A's approach to grant research is that Coalinga will share the cost of research with all other full-service B&A clients. This means that the City will only pay for only a small percentage of the total time the research team works.

**Funding Opportunity Summaries.** Your assigned "Lead Associate," Ms. Jill Mohler, will distribute all Fact Sheets against the Needs Assessment and will provide appropriate Fact Sheets and summary observations. When combined with the Needs Assessment, the LA knows which program guidelines need to be discussed with city staff. Grant research will begin immediately upon contract start and run continually throughout the duration of the agreement. Your LA will ensure that staff are alerted to grant opportunities to maximize the "go" or "no go" discussion and subsequent application development. After you review the Fact Sheet, your LA will initiate a conference call to discuss whether you should pursue the funding opportunity. The research team will provide your LA with as much post-award information as possible, such as reporting requirements, to assist with your discussions.

## GRANT PROPOSAL DEVELOPMENT AND SUBMITTAL

Unique in the field of grant writing, our approach has been tested and proven to be successful, as evidenced by our record of winning over 75 percent of all applications B&A has submitted since 2014. Our unmatched knowledge and experience with grant programs, our daily research, and assistance with the "go" or "no go" decision making process, ensures that we are aware of what grant entities are looking to fund. Our services are designed to ensure that our clients do not miss potential grants that support their needs, provide programs and services utilizing grant funds, and ensure proper reporting and close-out for awarded grants. Unlike many of our competitors, all B&A applications are custom developed, with unique narrative, graphics, photos, and artwork so the funding agency cannot tell one B&A application from another. This means there is no cutting and pasting, no look alike templates, and no factory style applications.

The duration of each grant application development process is driven by a few key milestones. Once Coalinga expresses interest in a grant, B&A develops a Not-to-Exceed quote outlining the tasks necessary to complete the application and total cost for services. The first milestone is the "go" determination and notice to proceed. The more quickly a "go" decision is made, the more time both B&A and city staff have to develop the application. Typically, an application will be due within one to three months of the release of the call for projects. B&A's detailed T&C ensures that all parties are aware of the project timing. The following summarizes B&A's systematic grant writing process:

- Based on the due date and proposal requirements, develop a list of tasks that must be accomplished in a timeline format (T&C). This includes who is responsible for completing the tasks and the dates tasks are to be completed. As a turnkey writer, B&A attempts to complete as much of the application as independently as possible. B&A provides the leadership for the coordination of any necessary meetings, conference calls, or discussions.

- B&A develops an application outline that includes the narrative questions from the call for projects that need answering. Including this text in the early phases of development ensures that city staff and B&A associates are aware of the application requirements. B&A's associates are trained and skilled in developing narrative, with compelling arguments, in active voice, and within any character limitations. Using this outline, B&A conducts a kick-off conference call discussing the program, the T&C, and application.
- Starting with long-lead tasks, B&A researches necessary information, meets with appropriate staff, stakeholders, and consultants, and develops proposal language, including the scope of work, budget, timeline, justification, cost-benefit analysis, transmittal cover letter, and completing all necessary federal, state, and local forms, certifications, assurances, etc. B&A interviews key staff and/or other consultants, to capture as much information about the project as possible. B&A determines necessary approvals from the Council authorizing the submission of the grant proposal and/or local match funding commitment, etc. This includes developing staff reports and/or resolutions for city staff to include on the Council agenda.
- Concurrently, B&A determines the role of any stakeholders and identifies those stakeholders in coordination with staff and consultants. B&A takes the lead on coordinating any necessary stakeholder meetings. B&A will work with staff to identify stakeholders for letters of support (LOS) and will develop the LOS for distribution. Except for elected officials, B&A will distribute the LOS for signature and will track letters to ensure they are returned. Due to the sensitivity of the political environment, it is best that LOS for elected officials be distributed by city staff. B&A will assist to the maximum extent practical.
- B&A attends any pre-proposal conferences, etc. hosted by the grant making agency. B&A collects data and photographs as independently as possible from existing resources such as General Plans, CalEviroScreen, Melissa Data, Google Earth, Virtual Earth, etc. All Associates are trained in the use of these tools, no outside consultants are required.
- B&A determines if any special graphics, artwork, maps, etc. are needed and incorporates those figures into the proposal as soon as possible. B&A generally develops the graphics, maps, and artwork in house. However, if specialized GIS maps are required, B&A has standing relationship with GIS specialists to perform these tasks.
- B&A conducts any greenhouse gas reduction, water savings, energy savings and other calculations as necessary. B&A staff are trained in the calculation tools accepted by most grant funding agencies including the California Air Resources Board emission reduction and greenhouse gas reduction tools. B&A maintains relationship with specific technical or engineering firms who can provide access to other modeling tools.
- B&A provides draft copies of grant proposals (80 percent and 100 percent) to the City and necessary consultants with an adequate amount of time to allow for feedback and final editing. The policy is to provide at least 72 hours for review time (longer if possible). B&A then reviews and incorporates staff edits or discusses any edits that might impact the scoring of the project or exceed proposal limitations. The 80 percent draft is intended to ensure the technical aspects of the proposal are accurate and

consistent with the goals of the City, including the budget. The final (100 percent) draft ensures that staff are comfortable with the final application and have an opportunity to interject any final adjustments, signature, and approval to submit.

- If submitting hard copy applications, B&A makes all necessary copies and ensures proper delivery by the due date. Associates have full authority to ensure delivery through any means necessary. If submitting electronic applications via the internet, B&A coordinates any password or authorization requirements as early as necessary to ensure the timely submission of e-grants. B&A has never missed a grant deadline (something many of our competitors cannot honestly claim).
- B&A maintains a comprehensive project file throughout the development process which is provided to staff once the grant is submitted and/or approved. Documents are provided on a flash drive with all research materials and work products. NOTE: B&A does not retain any ownership rights for any work products developed under a contract with a government agency. All original work products are provided to the client. All electronic files are in Microsoft Word, Excel, or other appropriate software.
- Debriefings. If a grant is denied, B&A will coordinate with staff and the grant agency to request a debriefing. Debriefings are extremely valuable because the team can determine why the grant was denied and receive recommendations on strengthening the proposal for the next grant cycle.

While the application is undergoing development, B&A will continually assess and score the project and application against the program requirements to ensure that it remains highly competitive. As described earlier, B&A regularly strategizes the best approach to maximize the grant agencies interest in Coalinga's project and ensures that the requested budget fits the goals and objectives of the grant agency, thereby maximizing the potential for award. Also, throughout the grant development process, the B&A team works as independently as possible but sufficiently close with staff to coordinate work and ensure continued communication throughout the proposal development process.

As a project, grant writing is unique because there is a hard deadline that must be met. B&A controls the schedule because it is crucial that the application be submitted on time. Our staff is cognizant of the need to get the 80 percent and 100 percent drafts delivered on schedule and they are given full latitude to ensure delivery of the application. We have had occasions where extreme measures were taken due to failures with FedEx, and the application was still delivered on time.

## GRANT ADMINISTRATION

**Grant Administration.** Managing awarded grants is somewhat like the grant writing process in that B&A follows detailed written processes and procedures. The duration of the administration of a project is driven by the grant agreement, which identifies the reporting and disbursement requirements and deadlines, the period of performance (the delivery of the funded project or program), and any post-period of performance assessments, tracking, or reporting. The completion of the project is not always the completion of the grant management effort. Often the grant agency wants to see the completed financial process, including releasing retention, etc. Some grants have extended reporting periods that can last months and years after the completion of the project. A typical public works project can easily have a two- to five-year period of

performance with an additional 90-day close out and audit period upon completion. Amazingly, there is one grant program that requires post closeout reporting for 55 years.

With respect to grant management, B&A has provided either turnkey (100 percent involvement) or semi-turnkey post-award grant management assistance for approximately 80 funding agreements. These funding agreements range in size from \$40,000 to plant trees along a trail to over \$72 million to construct a wastewater facility. Our experience with compliance and reporting requirements is also significantly varied and includes a myriad of topics including environmental law (both NEPA and CEQA), human subject protection, prevailing wage, Buy America, American Iron and Steel, and many others.

**Blais Grant and Project Management System (BGAPS).** B&A has developed grant and project management software called Blais Grant and Project Management System (BGAPS) that improves the crucial link between the Project Manager's efforts, the regulatory requirements, and the reporting and reimbursement process. The software streamlines the grant/loan management and project management process. The portal provides up-to-the-minute data about your grants or loans. The software is extremely unique for the industry in that it is designed as a "single portal" meeting a variety of project personnel needs including engineers, project managers, finance, auditing, compliance, and executives.



BGAPS is designed to handle multiple project hand-off points, track and manage the project from grant development to close-out and audit. The system allows both Coalinga and B&A to upload all relevant documents into a single cloud-based file system that eventually custom builds the audit binder. When undergoing an audit, the auditor is given access to the audit tab and all documents needed are available for their review. The system has already been used by cities for their audits and the auditors have enjoyed using the system.

The following summarizes B&A's systematic grant management process:

- **New Grant Agreements.** For new grant awards, B&A reviews the draft grant contract/agreement to ensure it aligns with the grant application (no major deviations in scope of work, schedule, and budget) and helps identify rules and regulations that may be of concern. B&A will work with the city staff and others to liaison with the funding agency (if desired) to negotiate or clarify any ambiguities. B&A staff are experienced in drafting Resolutions that may be required as a condition of receiving an award and can also assist in developing the accompanying staff reports or council agenda document. The objective is to ensure that a grant agreement is successfully executed on time, that the City can successfully administer the grant given the conditions of award, and the agreement articulates the scope of work, budget, and schedule correctly. Ongoing communication with city staff and legal department is essential during this phase.
- **Existing Grant Agreements.** If a grant agreement has already been executed and the project assignment is being given to B&A "midway" through a grant agreement's performance period, B&A reviews the entire agreement to ensure familiarity with important deadlines, requirements, and nuances,

etc. B&A would like to point out that approximately five years ago the Corona Department of Water and Power engaged B&A to manage approximately 15 grant awards that were at various stages of completion. Most of these grant awards have since been successfully closed out and the assignment is almost complete.

- **BGAPS.** All grant agreements are entered into B&A’s proprietary, Cloud-based grant and project management software, BGAPS. Critical data is collected and entered, which results in significant time savings for all project team members, including the project manager, finance, procurement, auditors, etc. BGAPS is also extremely effective for projects that may transition between departments or project managers. BGAPS data entry is critical because it provides a single portal for all team members (to include project managers) to access data and reports. Examples of BGAPS data entry that will be accomplished at this phase include:
  - **Compliance Checklist** – a detailed list of all rules, regulations, and policies that must be adhered to. Each compliance entry includes a citation (where is the rule located) and an assigned team member (by name). Compliance entries are not date specific – rather they are rules and regulations that govern the entire project’s performance period.
  - **Project Schedule** – a detailed list of all tasks and dates the project manager, grant manager, and team desires to track throughout the life of the project. Project Schedule entries are date specific and are assigned to specific team members. Starting 90-days out from a deadline, the responsible team member receives an auto-generated email reminder each Friday. When the task is completed, the task is marked “completed” in BGAPS and the email reminder ceases. The Project Schedule can be as minimal or complex as desired. Quarterly reports and other grant-related project reports will be entered within the Project Schedule to ensure on-time submissions.
  - **Financial Reports** – the original, approved budget is entered into BGAPS in as much detail as desired by the project manager and finance director. BGAPS can track the most complicated line item budgets and was developed based on budget requirements from the California State Water Resources Control Board. Amendments to the budget are entered as separate entries allowing auditors to quickly identify a budget amendment. Requests for reimbursements are entered and reconciliation is performed by BGAPS. Local match information and other grants that may be participating on the project are entered as well.
  - **Project Team** – all project team members contact information is entered, which also creates dropdown menus for other sections within BGAPS – for example, the Project Schedule and Compliance Checklist where project team members are assigned tasks, etc.
  - **Document Library** – all documents pertaining to the project are uploaded and filed in appropriate categories to include grant solicitation, grant award letter or email, original grant agreement, governing documents, training workshops hosted by a funding agency, forms and templates required for reports and requests for reimbursements, etc. Documents that are required to be available for an audit are tagged and made available for viewing in a specific **Audit Tab** within BGAPS. This tab is available for view only access for any third-party auditors (with permission).

- **Coordination.** Once BGAPS is populated for a new, or existing, grant award, reports can be generated to help guide the administration of the grant and the project. Depending on the complexity of the grant award and project, B&A and Coalinga may determine that a standing monthly call is necessary to ensure open communication and “check-ins” for compliance issues, schedule, and reimbursements. For example, B&A is currently managing a \$72 million Clean Water State Revolving Fund loan, which has required a monthly coordination call with all engineers, DBE and prevailing wage contractors, construction manager, financial staff, and accounting, etc. The call time includes reviewing the Compliance Checklist and reminding team members about their responsibilities, reviewing the Project Schedule against the grant timeframes and identifying issues that may impact the schedule, reviewing the Financials to include outstanding / pending requests for reimbursements and their timing and impact to cash flow, reviewing upcoming deadlines and requests from the funding agency, and any other topic that may affect the grant, local match, and project. These check-in calls are a best practice at B&A and highly recommended if there is a history of encountering obstacles to successfully completing grant-funded projects. For check-in calls, B&A takes the lead in developing the agenda, hosting, leading, and providing meeting minutes and a list of action items. All action items are documented and monitored for completion.
- **Day-to-Day Needs, Reports, and Requests for Reimbursement.** In between check-in calls, B&A staff attend to the day-to-day needs of each grant including preparing quarterly reports and requests for reimbursements. These efforts are undertaken to ensure on-time submission and city staff will be provided with sufficient time to review draft and final submissions and provide feedback. For required reports, B&A will use any agency supplied forms and templates or will develop templates as needed. B&A will populate and develop all forms as much as possible and with minimal impact on staff time. Requests for reimbursements are coordinated with the project manager and finance team and includes reviewing backup documentation, resolving discrepancies or errors in invoices provided as backup documentation, reviewing costs against rules and regulations to ensure submitted invoices are eligible for reimbursement or local match, etc. Reimbursement requests are tracked with the funding agency for payment and BGAPS tracks retainage. Your B&A grant management team is available daily and will assist with emergency needs as well. For example, one B&A client recently identified being out of compliance with respect to the American Iron and Steel regulations. B&A worked with both the state and federal governing agencies to help bring resolution to the issue. While B&A does not represent themselves to be experts on specific topics like American Iron and Steel, Buy America, DBE, prevailing wage, etc. B&A staff are well versed enough to understand the generalities of these compliance issues and uses project management skills and liaison skills to help bring people together who can resolve technical issues.
- **Notes and Document Control.** All communication and documents are retained within BGAPS for long-term retention. A Notes tab within BGAPS captures “on the fly” information by date and person entering the information. For example, a call with the funding agency giving permission to skip a quarterly report can be quickly entered into the Notes tab and saved for perpetuity. Many B&A clients struggle with maintaining a comprehensive log of communication and documents. These issues are managed by your B&A grant management team who will ensure all documents are filed appropriately, tagged for the Audit Tab, if needed, and maintained for quick and easy access.

- **Amendments.** Your B&A grant management team will help process amendments to your grant agreement to include scope of work changes, budget modifications, and extensions.
- **Closeout and Audits.** Most grant agreements require specific closeout procedures or have audit checklists. Your B&A team will assist in preparing and submitting closeout documents and preparing for audits. To date, B&A has not had a major audit finding in any of the more than 80 programs we have managed.

## OTHER SERVICES AND UNIQUE ELEMENTS

**Readily Available.** One B&A feature that sets us apart is our ability to react quickly in a time of need or crisis. For example, B&A assisted the City of Anaheim in submitting a Pre-Disaster Mitigation Advance Assistance grant application to study a unique fire suppression system at Anaheim Hills. The application was submitted via the FEMA e-grants portal. Twice, a CalOES representative called in haste needing information uploaded or changed within a couple of hours. CalOES was unable to reach City of Anaheim staff and therefore contacted B&A for assistance. Within the two-hour window of time given B&A provided the needed information.

**Distance is no Obstacle.** With use of today's technology, distance is no obstacle. We routinely conduct meetings and conference calls using the latest tools including GoToMeeting with ease. Our clients enjoy that they can take calls with us anywhere and anytime.

**Graphic Artist.** B&A utilizes a professional graphic artist and can produce the highest quality documents when needed. We carefully balance the need for this level of service with each assignment to ensure the right message is communicated. Many funding agencies frown on "overly glamorous" documents but there are times when certain quality maps, graphics, etc. are needed.

**Award Nominations.** B&A has developed 15 award nominations for the Anaheim Public Works Department alone, including nominations to organizations like the Orange County Business Council, American Society of Civil Engineers (OC Branch), Southern California Association of Governments, Urban Land Institute (OC and Inland Empire branches), American Public Works Association, California Transportation Foundation, and others. B&A's writing skills extend to all forms of technical writing. Other cities and agencies have also called upon B&A to assist with award nominations.

**On-line Portals and Grants.gov.** One area where B&A takes pride in excelling is being more familiar with online portals and tools than our clients. B&A has established online registrations for numerous clients for the California Department of Water Resources' Grants Review and Tracking System (GRanTS), the State Water Resources Control Board's Financial Assistance Application Submittal Tool (FAAST), and the federal government's System for Award (SAM) and grants.gov systems. The following examples help underscore B&A capabilities and experiences:

**Bureau of Reclamation ASAP System:** B&A's grant management team has experience with using the BOR's ASAP system, which is a required system for drawdown requests, etc.

**GRanTS:** B&A staff worked with City of Anaheim to develop a grant proposal for DWR's Water-Energy Grant Program for the Dad Miller Golf Course. Using the GRanTS system, all proposal information and attachments were successfully uploaded and submitted by the due date. B&A staff routinely use the GRanTS system and we find this system to be extremely user-friendly and stable (compared to other portals).

**FAAST:** Due to the significant number of times B&A staff utilize the FAAST system, B&A maintains our own registration account to have easy access to the system. Several non-water related California State agencies are starting to use the FAAST system for their own grant programs, which is helping eliminate the burdensome "paper" submissions so many State agencies require. B&A has submitted multiple FAAST submissions for a variety of clients.

**SAM and www.grants.gov:** B&A's research team is the lead in being our internal experts on helping clients maintain their SAM account, registering/setting up an account with grants.gov, and maintaining currency with the grants.gov system.

B&A charges on a time and materials basis. Due to our low overhead and flat management structure, B&A utilizes a blended rate for all of our staff. The rates are provided below:

**B&A FEE SCHEDULE**

B&A charges on a time and materials basis. Due to our low overhead and flat management structure, B&A utilizes a blended rate for all of our staff. The rates are provided below.

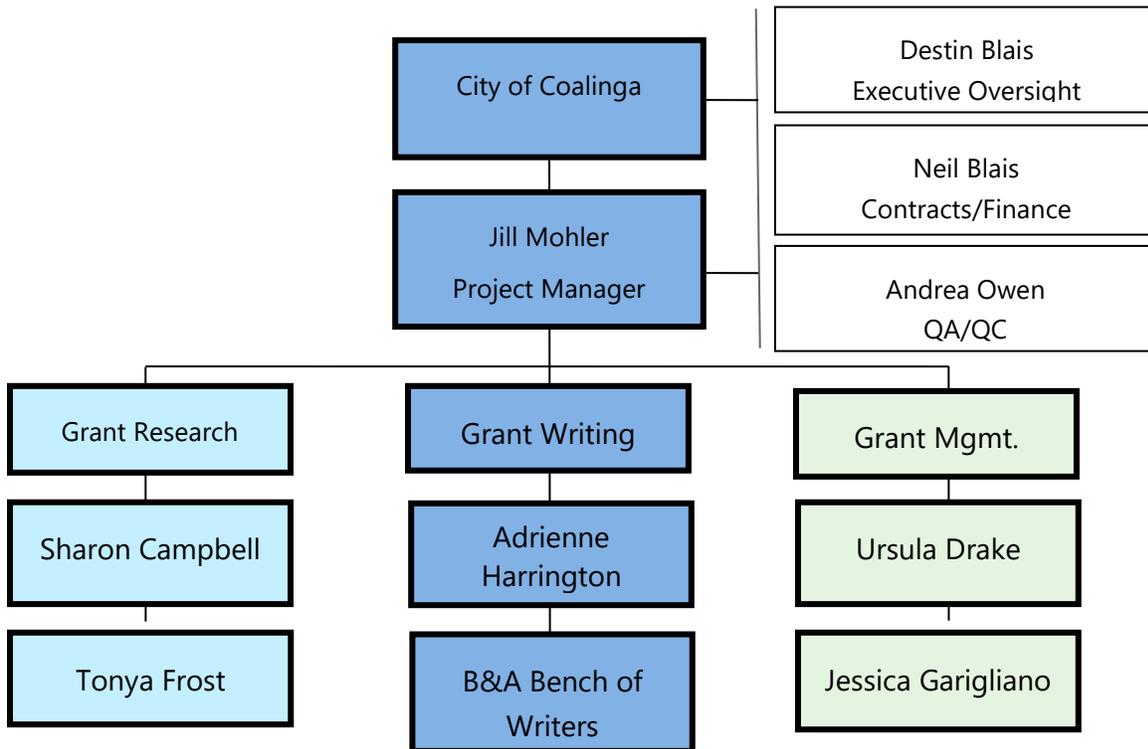
TABLE 4 FEE SCHEDULE

Description	Fee
Staffing/Labor (billed in 15-minute increments)	\$105/hour
Mileage (billed at current IRS rate)	\$0.58/mile
Travel (tolls, airfare, hotel, cab)	Cost
Copies/Reprographics	Cost
Telephone (long distance only)	Cost
Courier Service or Express Mail	Cost
Postage	Cost

**PROPOSED PROJECT TEAM ORGANIZATION**

B&A proposes to assign our highly experienced Associate, Jill Mohler, as your LA. Ms. Mohler will be supported on a day-to-day basis by Ms. Adrienne Harrington. Vice President Andrea Owen will provide quality control and executive oversight along with Ms. Destin Blais who will oversee all work and provide strategic direction. Mr. Neil Blais will be responsible for all contracting, invoicing, and insurance requirements, etc. Your proposed team has the support of the entire B&A bench including several strong and experienced writers. All proposed personnel, especially Jill, who is key, shall be available to the extent proposed or required by Coalinga for the duration of the project. No key personnel shall be removed or replaced without the prior written consent of the City.

**Figure 1: Organization Chart for City of Coalinga Team**



**Jill Mohler, Client Services Director.** Jill joined Blais & Associates in 2007 and has been a client LA since 2009. Her clients include the cities of Coalinga (on-call), Torrance, Farmersville, Apple Valley, and Windsor. She has a strong background in journalism and experience with the research and development of compelling stories. Under the guidance of Andrea Owen, Jill will expand her current role as LA for the City of Coalinga in support of this RFP.

**Adrienne Harrington, Associate.** Adrienne has over 15 years of experience in transportation planning, government affairs, and grant development. Adrienne joined B&A in 2018 and has assisted Directors and Senior Associates with various projects and applications. Her responsibilities include developing grant applications, letters of support, resolutions, and other documents.

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**EXECUTIVE MANAGEMENT SUPPORT TEAM**

**Neil Blais, President & Chief Executive Officer.** In 2007, with the growth of B&A, Neil joined the firm as President and CEO. Neil is responsible for all corporate management including business development, contract negotiations, insurance, accounting, finance, labor compliance, law, and technology. Neil also serves as an independent touch point for client satisfaction. He routinely meets with clients to ensure overall customer satisfaction.

**Destin Blais, Founder.** Destin has over 20 years of direct grant writing and management experience. Her grant writing and management experience spans working for three government agencies prior to launching B&A. Destin oversees all day-to-day management of staff and projects and routinely reviews 80 percent

draft and 100 percent final proposals and reports. She is a hands-on leader working to keep B&A's standard of excellence and professionalism at the forefront of all work products.

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#### QUALITY CONTROL

**Andrea Owen, Vice-President.** Andrea has extensive writing experience through her 20 years of developing and implementing marketing and advertising plans for a variety of products and services. Andrea joined B&A in 2010 and her writing experience in the advertising and marketing industry helps guide her grant writing efforts. Her current assignments include Administration of B&A's Irvine Office and California staff, Western Riverside Council of Governments, Delano, and East Valley Water District. She will review all documents for quality and work with Jill to manage multiple projects.

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#### GRANT RESEARCH TEAM

**Sharon Campbell, Research Associate.** Based in Irvine, Sharon Campbell is an experienced researcher and grants administrator. She is responsible for maintaining the company's extensive database of grant solicitations, requesting funding proposals for our library, completing Fact Sheets for newly announced grant solicitations and providing them to associates for distribution, project specific research, supporting associates, attending workshops and webinars, and maintaining our internal "tracking chart" for our monthly all hands meetings.

**Tonya Frost, Research Associate.** Tonya Frost is responsible for researching and updating the B&A on-line Grant Calendar with all of the grant opportunities for the State of California and the State of Texas.

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#### B&A POST-AWARD MANAGEMENT TEAM

**Ursula Drake, Director, Grant Management Services.** Ursula Drake joined B&A in 2016 with over 15 years of experience managing grant programs. Ursula is currently managing 30 grant programs for B&A and continues with our success of passing all audits without a single audit finding.

**Jessica Garigliano, Grant Manager.** Jessica joined B&A in 2018 with substantial experience in grant management within the public sector. She is currently assisting Ursula with the grant management projects.

#### Team Process and Resources

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### PHILOSOPHY FOR GRANT APPLICATION DEVELOPMENT

B&A's philosophy for developing grant applications is simple. Follow our tested process and procedures, train our writers, and ensure quality control over every document. B&A does not allow our writers to become focused on one type of grant or agency department. This ensures that all of our writers can develop any grant application that may be needed. Monthly, the entire B&A team meets to discuss clients, projects, and grant programs. Jill will have access to the entire bench of writers should the need arise. B&A has regularly developed multiple applications for clients, and every application is treated as a unique project. B&A strives to tell your story in a compelling fashion. Our goal is to have every application win every time.

## Supplemental Information

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### INSURANCE

B&A has reviewed the insurance requirements, which our insurance exceeds. B&A will ensure timely receipt of the insurance certificates and documentation if selected.

### BUSINESS LICENSE

B&A will obtain and maintain a business license for the City of Coalinga similar to many of our other municipal clients.

### INCORPORATION OF RFQ IN AGREEMENT

B&A acknowledges that the RFQ shall be incorporated, in its entirety within the subsequent agreement.

### EXCEPTIONS TO THE AGREEMENT

B&A has reviewed the sample professional service agreement and does not have any exceptions to the agreement.

## REFERENCES

The RFQ requests “The name of a contact person for those public agencies you are currently under contract with, or have been under contract with, over the past five (5) years. B&A currently has approximately 60 active clients in California and Texas, of which 28 have been clients for five years or more. Those clients are listed in Table 4 below. If requested, B&A can easily provide contact information for the 28 clients should Coalinga request it. For expedience, however, B&A is providing detailed information for four clients who are either close (proximity) to Coalinga or of similar size and services.

TABLE 4 B&A CALIFORNIA CLIENTS WITH MORE THAN FIVE YEARS OF SERVICES

California Client			
American Canyon	Anaheim	Anaheim Transportation Network	Apple Valley
California Rural Water Association	Chino Hills	Colton	Corona
Delano	East Valley Water District	Elsinore Valley Water District	Farmersville
Fontana	Fullerton	Indio	Mission Viejo
Newport Beach	Norwalk	Ontario	Pasadena
Rancho Palos Verdes	Torrance	Western Municipal Water District	Western Riverside County Regional Wastewater Authority

B&A is pleased to provide four client references, three of which are in the Central Valley region. The Cities of Delano and Farmersville all utilize B&A’s research, writing, and consulting services. B&A is pleased to provide a listing of grant projects developed for each client in 2017 through 2019. For all of the listed projects, B&A provided turnkey grant writing. This includes development of the grant application narrative, development of the project budget and narrative, forms, and other documentation. B&A submitted the applications for the client. Note that client staff were required to provide technical information on the projects, cost estimates, labor rates, etc.

CLIENT REFERENCES AND RECENT PROJECTS

**Reference #1: Reference Contact and Relevant Projects for the City of Farmersville**

Mr. Steve Huntley	Finance Director	909 West Visalia Road Farmersville, CA 93223	shuntley@cityoffarmersville-ca.gov (559) 747-0458
Services provided by B&A: Needs Assessment, Monthly Grant Research and Consulting and Grant Activity Report (GAR) Conference Call, Grant Writing, Post-award management. B&A has provided full-service support from 2007 to present. Since inception, Farmersville has received nearly \$18 million in grant funding and has an ROI of \$46:\$1			
Year	Grant Program	Project Description	Award
2019	U.S. Department of Housing and Community Development Community Development Block Grant	Alleyway and Jennings Park improvements (\$1,015,983 Requested)	Pending
2019	California Natural Resources Agency Cultural, Community, and Natural Resources Grant	Farmersville Community Park Phase III – Sequoia Gateway (\$1,908,206 Requested)	Pending
2019	California Office of Emergency Services Hazard Mitigation Grant	Backup Generator for Well #7 (\$75,000 Requested)	Pending
2019	California Office of Emergency Services Hazard Mitigation Grant	Backup Generator for Well #6 (85,533 Requested)	Pending
2018	Caltrans Sustainable Communities Transportation Planning Grant	ADA Compliance and Active Transportation Safety Enhancement Plan	\$206,275

**Reference #2: Reference Contact and Relevant Projects for the City of Delano**

Ms. Maribel Reyna	City Manager	1015 Eleventh Avenue Delano, CA 93216-3010	MReyna@CityofDelano.org (661) 721-3303 ext 2269
Services provided by B&A: Needs Assessment, Monthly Grant Research and Consulting, GAR Conference Call, and Grant Writing. B&A has provided services since 2014. Since inception, Delano has received over \$7 million in grant funding and has an ROI of \$50:\$1.			
Year	Grant Program	Project Description	Amount
2018	Caltrans Highway Safety Improvement Program	Set-aside for Pedestrian Crossing Enhancements	\$249,300
2018	California Natural Resources Agency Land and Water Conservation Program	Eleventh Avenue Outdoor Community Pool	\$2,640,300
2017	California Department of Finance Community Based Transitional Housing Program	Domestic Violence Shelter and Programs	\$1,974,600
2017	California Natural Resources Agency Urban Greening Program	Eleventh Avenue Center Greening Project	\$528,000
2017	San Joaquin Valley Air Pollution Control District Bikeway Incentive Program	SJVAPCD Class II Bike Lane Project	\$86,827

**Reference #3: Reference Contact and Relevant Projects for the City of Yuba City**

Mr. Brad McIntire	Community Services Director	1201 Civic Center Boulevard Yuba City, California 95993	bmcintir@yubacity.net (530) 822-4650
Services provided by B&A: Needs Assessment, Monthly Grant Research and Consulting and GAR Conference Call, Grant Writing. Contract start – 2017. Since inception, Yuba City has received over \$7 million in grant funding and has an ROI of \$44:\$1.			
<u>Year</u>	<u>Grant Program</u>	<u>Project Description</u>	<u>Award</u>
2019	California Office of Emergency Services Hazard Mitigation Grant Program	Back-up Generator for Fire Station #2 (Requested \$169,280)	Pending
2019	California Office of Emergency Services Hazard Mitigation Grant Program	Aquifer Storage Recovery System	\$4,875,000
2018	Sacramento Council of Governments Active Transportation Program	Bridge Street Safe Routes to Schools Program (Requested \$662,204)	Pending
2018	Sacramento Council of Governments Regional Funding Program	Harter Parkway and Sutter Bike Gap Closure (Requested \$1,983,533)	Pending
2018	Sacramento Council of Governments Civic Laboratory	Bridge Street Civic Lab Project	Pending
2018	California Office of Emergency Services Hazard Mitigation Grant Program	Back-up Generators for the Animal Control Center (Requested \$172,996)	Pending
2018	California Office of Emergency Services Hazard Mitigation Grant Program	Back-up Generators for Critical Facilities (Requested \$1,621,511)	Pending
2018	California Office of Emergency Services Hazard Mitigation Grant Program	Back-up Generators for Various Facilities (Requested \$4,657,117)	Pending
2018	CalFIRE Urban and Community Forestry Program	Urban Forest Management Planning Project	\$376,000
2018	California Natural Resources Agency Land and Water Conservation Fund	Harter Park Development Project	\$800,000
2018	Bureau of Reclamation WaterSMART Drought Response Program Resiliency Projects	Groundwater Well Project for Drought Resiliency	\$750,000
2018	California Office of Emergency Services Hazard Mitigation Grant Program	Yuba City Back-up Generators for Critical Facilities	\$150,000
2017	Caltrans Sustainable Transportation Planning Grant	Safe Routes to Schools Project	\$221,325
2017	Bureau of Reclamation WaterSMART Small Scale Water Efficiency Program	Irrigation Systems Upgrade Project	\$73,997

**Reference #4: Reference Contact and Relevant Projects for the City of Indio**

Mr. Rob Rockwell	Assistant City Manager; Finance Director	100 Civic Center Mall Indio, CA 92201	rrockwell@indio.org (760) 391-4115
<p>Services provided by B&amp;A: Needs Assessment, Monthly Grant Research and Consulting and Grant Activity Report (GAR) Conference Call, Grant Writing, Post-award management. B&amp;A provided on-call services from 2010-2016. B&amp;A has provided full-service support 2016 to present. Since inception, Indio has received over \$20 million in grant funding and has an ROI of \$66:\$1.</p>			
<u>Year</u>	<u>Grant Program</u>	<u>Project Description</u>	<u>Award</u>
2019	US Department of Transportation Better Utilizing Investments to Leverage Development (BUILD)	I-10 and Monroe Street Interchange (\$25 million requested)	Pending
2019	US Department of Justice COPS Stop School Violence Prevention Program	Coachella Valley Region Crime Gun Intelligence Center Integration Initiative (\$748,801 requested)	Pending
2019	US Department of Justice COPS STOP School Violence Prevention Program	Indio School Violence Prevention Program (\$93,792 requested)	Pending
2019	California Office of Emergency Services Hazard Mitigation Grant Program	Fire Station Emergency Generator Program (\$351,782 requested)	Pending
2019	Caltrans Sustainable Transportation Planning Grant	Oasis Street Corridor Enhancement Project (\$185,680 requested)	Pending
2019	Strategic Growth Council Transformative Climate Communities	Transformative Climate Communities Plan	\$200,000
2019	Coachella Valley Mountains Conservancy Proposition 1 Funding	Jackson Street and Avenue 50 Flood Improvement Project	\$500,000
2019	California Natural Resources Agency Department of Parks and Recreation Land and Water Conservation Fund	South Jackson Park Accessibility Improvement Project	\$625,000
2018	Mobile Source Pollution Reduction Control Committee Local Partnership Program	Local Government Partnership Project	\$50,000
2017	Caltrans Sustainable Communities Transportation Planning Grant	Multi-modal Feasibility Study	\$391,745
2017	California Department of Finance Community Based Transitional Housing Program	Indio Community Based Transitional Housing Program	\$1,949,006
2017	Caltrans Sustainable Communities Transportation Planning Grant	Indio Complete Streets Plan	\$300,000
2017	Southern California Association of Governments Sustainability Planning Grant	Bike Sharing Plan	\$200,000

<u>Year</u>	<u>Grant Program</u>	<u>Project Description</u>	<u>Award</u>
2017	California Natural Resources Agency Urban Rivers Program	Shadow Hills Retention Basin Project	\$486,625
2017	Caltrans Highway Safety Improvement Program	Pedestrian Countdown Timers Head Installation Project	\$250,000
2017	Caltrans Active Transportation Program	Herbert Hoover Elementary Pedestrian Improvements	\$2,983,000

## CLIENT / GRANT AGENCY TESTIMONIALS

- ▶ **“Everything was completed exactly like we needed it, to a “T.” I wish you guys could work on all our grant closeouts.”** – Noel Davis, CalRecycle
- ▶ **“Thank you for taking it off my plate and getting the work on Claremont’s end done!! Greatly appreciative!”** – John Costa, City of Claremont
- ▶ **“Rock star is putting it mildly. We are so pleased to have all of you on our team.”** – Pamela Galera, City of Anaheim
- ▶ **“Thank you for the great service. I appreciate your diligence and thoroughness.”** – Karl Francis, Western Municipal Water District

# OTHER INFORMATION

## DEMONSTRATION OF STAFFING TASKS EFFICIENTLY AND COMPLETING PROJECTS ON TIME AND WITHIN THE ALLOCATED BUDGET

B&A takes pride in being able to say that we have never missed a deadline for both grant writing and grant management. This is testament to our honed process that starts with identifying critical due dates and working backwards - - identifying all intermediate steps necessary to finish on time. Our internal tools are required to be used by all associates regardless of how small or large an assignment. In addition, associates are required to host internal check-in meetings with their team leader and identify obstacles that could impact a schedule or budget. Also, associates are assigned to projects based on their unique skill sets, which helps complete projects more efficiently and remain on budget.

To remain on budget, B&A uses an internal timekeeping system called Replicon that allows associates to input their time (in 15-minute increments) by client and by project. When a new project is assigned to B&A, the project and time allowed to spend is entered into Replicon. As associates "spend down" the project's budget, reports are generated at certain intervals that allow team leaders to view the time remaining on a project. Because B&A is a time and materials company and provides Not-to-Exceed quotes for all assignments, staying within the allocated budget is rarely cause for concern for a client. B&A only requests a change order if the client has materially changed the scope of work originally communicated and agreed upon or if the funding agency materially changes the grant management requirements.

One area that typically needs clarification is when a client does not complete a project or program within the original performance period and must request an extension in order to complete the agreed upon work. B&A quotes projects based on the approved performance period. When a client and funding agency extend a performance period because the project/program is not yet completed, this puts B&A in a position of needing to request a change order to continue providing technical assistance and grant management beyond the original performance period.

B&A also mandates the use of a Cloud-based file sharing system (Egnyte) to maintain client documents. This creates significant synergy and efficiency internally between B&A associates and externally with our clients. Egnyte can also serve as a FTP site allowing files to be uploaded or downloaded and used as a central filing system during an active assignment.

Within the past 12 months, B&A was called to assist a small, rural community to rescue a United States Department of Agriculture \$5 million forgivable loan that was in jeopardy of being rescinded due to noncompliance in meeting a funding commitment deadline. B&A quickly learned the facts about the issue and rallied all key staff and team members to create a plan of action. The funding agency was immediately contacted that a plan was created to comply with the deadline and B&A grant management staff completed the necessary forms and paperwork to meet the critical deadline. The issue was made more complicated by the fact that the State Water Resources Control Board had also provided significant funding for the same project (cost sharing) so losing the USDA forgivable loan would have been devastating to this rural community.

## METHODS TO ENSURE QUALITY CONTROL AND BUDGET/SCHEDULE CONTROL

B&A's quality assurance and quality control (QA/QC) guiding principles align with the company's overall mission which is to provide premier grant consulting services that exceed client expectations and never miss a deadline. This is especially true when managing multiple factors that are beyond B&A's control including lack of data, budget parameters, and timeframes to accomplish work. Depending on the parameters within a specific assignment, the following QA/QC principles are implemented to guide product development:

**Provide Accurate and Timely Invoices.** All assignments are quoted using B&A's standard quoting process and signed by the client prior to initiating work. All quotes are not-to-exceed time and materials. Change orders occur only if the client requests services outside the original quoted scope or extenuating circumstances are present such as a material requirement change by the funding agency.

Use of technical consultants require the approval of the client and costs are not marked up.

**Monitor and Stay Within Budget.** Invoices are detailed and checked against the Not-to-Exceed quote. B&A associates are required to record time expended daily in a cloud-based timekeeping system. Time expended is monitored throughout the life of an assignment.

**Monitor Schedules and Review Times.** All assignments use the B&A T&C (grant writing) or Tracking Table (TT) (grant management) tool to manage the project. The T&C or TT is presented at kick-off meetings and is a standing agenda item for check-in calls. The T&C or TT must include a schedule of milestones and items required from the client.

All assignments include interim check-in calls (both internal and external) as needed from project inception through to final due date or close-out date. Each interim check-in call must include a review of the pre-established timeframes. The deadlines and compliance are primary performance metrics.

**QA/QC Process to Ensure Quality Work and On-time Product Delivery.** All written materials undergo at least one level of internal/peer review by a senior associate or higher -- ideally with expertise in the subject matter. This includes a thorough review of 80 percent draft and 100 percent final documents using B&A's check-off list.

Drafts should be provided to client allowing at least 48-hours for review (longer if possible).

All reviews must be performed with hard copies and math computations must be double-checked using a calculator (not Excel). On-screen reviews are not allowed.

All information obtained from a 3rd party must be sourced as a footnote within any document prepared by B&A. Sources may be removed at the discretion of the client; however, during the 80 percent and 100 percent review process, sources must remain.

Long lead items should receive priority to ensure smooth delivery of documents, requests for reimbursement, quarterly reports, etc. This includes any document that requires City Council approval, such as Resolutions.

All online submissions must have portal logins and registrations confirmed at least three weeks prior to due dates, if possible.

All files should be maintained in Egnyte (no off-line file saving) and follow naming and filing protocols established within the B&A architecture.

Conference calls, including gotomeetings.com, shall be initiated 5-10 minutes prior to the start time to ensure B&A associate(s) are waiting and ready for the call and to attend to any technical difficulties. MS Outlook invitations must be sent to all attendees with clear instructions on how to participate.

Agendas and meeting notes are required for all formal conference calls. Meeting notes must follow the established B&A format and action items must be communicated to applicable team members (both internal and external) within 24 hours of said call/meeting.

Handwritten materials are not allowed (exception is handwritten thank you note, appreciation card, congratulations card, etc.). All correspondence must be typed (including address labels) using B&A standard 11-point Calibri format.

The quality of the final product (including the use of professional graphic artists) must be balanced with the project type, funding agency perception, and available budget.

B&A staff are authorized to go to any length to ensure on-time delivery, to include reprints, using 3rd party sources at the location of the funding agency, and courier by air travel.