



# CITY OF CHICAGO DELEGATE AGENCY

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## iSupplier (eProcurement) Grant Writing and Online Bidding Workshop



# Grant Writing and iSupplier Agenda

- ❖ Grant Writing Tips
- ❖ Overview of iSupplier (eProc)
- ❖ iSupplier Registration
  - ❖ Updating Organizational Information
  - ❖ Uploading Documentation
- ❖ RFP ('Creating a Quote') and RFP Addendums

# Grant Writing Tips

# Grant Writing Tips – Proposal Development

## *Designed to Provide Helpful Tips and Recommendations for Grant Writing*

- Read the Funding Announcement (RFP) Carefully and Ensure Alignment with Organization's Mission and Goals - Understand the Organizations Needs
- Thoroughly Review the Proposal and Incorporate a Team Approach for Development and Review
- Ensure that the Organization Has the Capacity to Implement/Execute and Accomplish Program Goals and Secure Executive/Board Approval (as required)
- Conduct an Analysis of the Need, Cost Benefit, Resources, Current Organizational Structure, and Fiscal Capabilities
- Ensure Capability to Comply with Fiscal, Programmatic Requirements, Long Term Compliance Requirements
- Clearly define services to be provided directly or through partnerships/linkage agreements with other agencies that are appropriate to achieving desired outcomes

# Grant Writing Tips – Proposal Development

- **“Tell the Story”** with the Narrative and Budget and Write Convincingly/ Persuasively - Present a logical solution to a problem.
- **Demonstrate** that the Organization Understands the Request and Can Meet the Need of the Granting Agency
  - Understand the Funder’s Needs and Target Population & Challenges
- **Research** to ensure that the program is a good fit for the organization’s mission/goal/needs
- Provide **Statistics** when Possible and Necessary and Best Practices
- **Highlight** strong national or local evidence base that aligns with best practices for the relevant program
- **Demonstrate** an effective approach to identifying and retaining program participants
- Show the **Value the Organization will Bring** to the Project; Identify Key Staff Responsible for Completing the Proposal
  - Experience
  - Staffing
  - Partnerships
  - Knowledge-base
  - Fiscal Capacity

# Grant Writing Tips – Proposal Development

- Basic/Major Areas of a Proposal:
  - Overview of Organization and Mission Statement
  - Problem Statement
  - Proposed Solution
  - Cost and Justification
  - Goals and Objectives
  - Proposal Details
  - Impact/Results/Outcomes
  - Implementation Timeline
  - Risks and Challenges
  - Collaborations/Partnerships
  - Tracking Tools and Systems
  - Resources and Capabilities

# Grant Writing Tips – Proposal Development

- Demonstrate Financial and Administrative Capacity to Execute a City Contract
- Prepare a Responsible Budget with Current Job Descriptions and Resumes
- Review Budget and Provide Appropriate Justification for Expenses
- Ensure Budget and Narrative are Consistent and All Figures Tie-Out
- Provide Realistic and Obtainable Objectives/Outcomes/Goals

# Grant Writing Tips – General Reminders

- Establish the Timeline and Work Backwards to ensure Timely Submission –
  - Project Planning/Resources/Required Documents/ Certifications
  - Do Not Procrastinate Wait to Draft and/or To Submit
  - Set Calendar Alerts
  - Use an Outline and Checklist
- Participate in All Technical Assistance and/or Webinar Session  
- Ask Questions/Take Notes
- Use Calculating Software to Minimize Human Error
- Spell Check



# Grant Writing Tips – General Reminders

- ✓ **Start Early/Log In**
- ✓ Organize Concepts
- ✓ Write persuasively
- ✓ Follow the RFP and Supplemental Details as Instructed
- ✓ Provide Strong Content and Concise
- ✓ Use Correct Grammar
- ✓ Complete All Requirements and Fields
- ✓ Double Check Prior to Submission – Internal Control and Quality Control Review
- ✓ Review the Evaluation Criteria and the Associated Weights/Scoring Value
- ✓ Be Honest/Forthright
- ✓ Use a Checklist
- ✓ Attend Pre-Conference
- Ensure All Required Attachments are Submitted
- Letters of Support, Resumes, Graphs/Charts, Previous Results, etc.
- Name Attachments Properly with Consistent Format/Style Titles and Header References (as Necessary)
- Leverage calculating software
- ✓ **Submit Before or On Time**

# iSupplier/eProcurement Overview

# What is iSupplier (eProcurement)?

- New Real-Time Online Purchasing System with Data Export
- *Replaces Existing Processes and Systems*
- Required for Doing Business with City of Chicago
- Full Service System Allows Agencies to:

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graph LR; A[Manage Delegate Agency Info.] --> B[Review & Respond to Solicitations]; B --> C[Submit RFP]; C --> D[Submit Vouchers for Payment]; D --> E[Communicate with Departments];
```

Manage Delegate Agency Info.

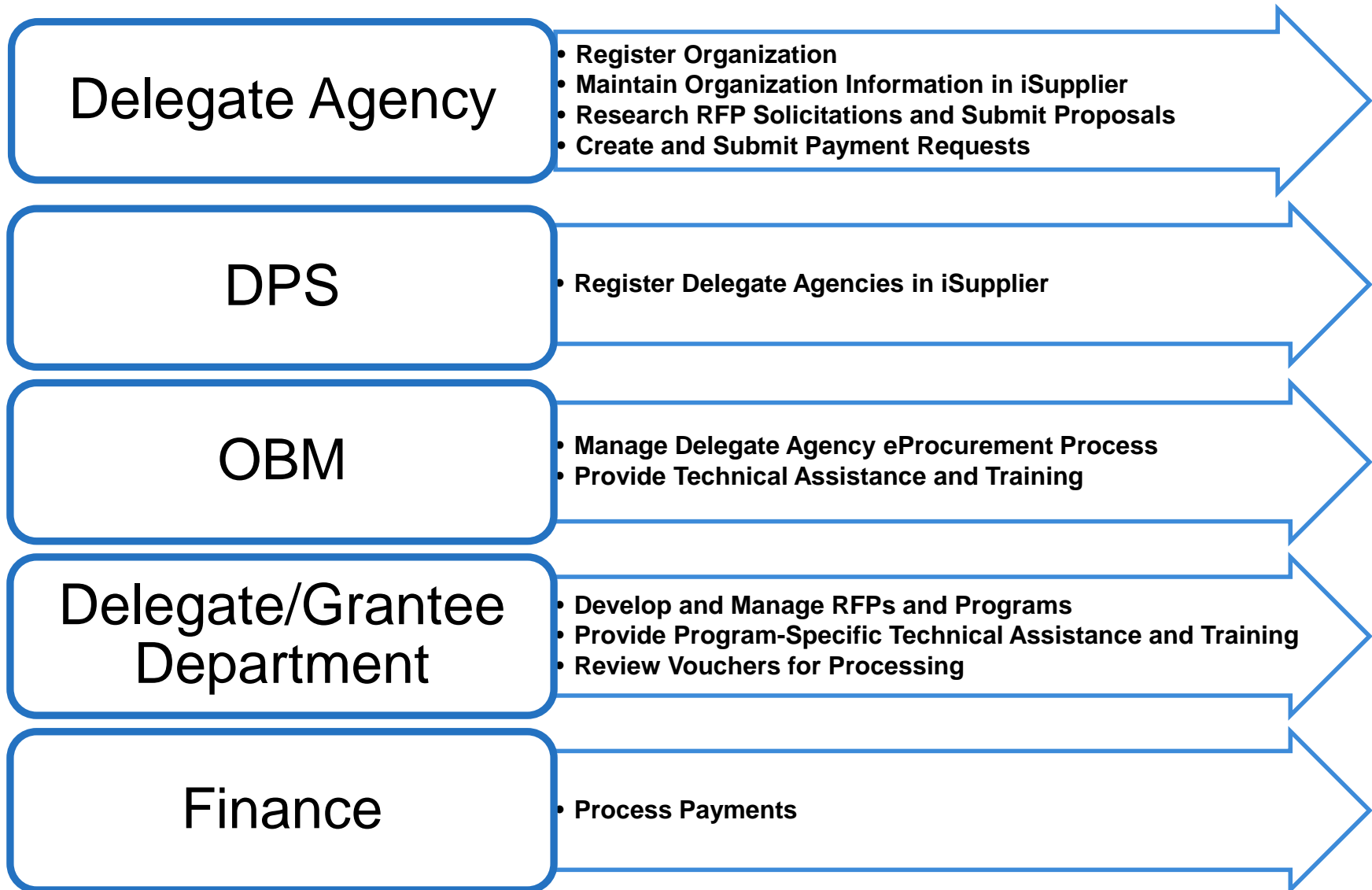
Review & Respond to Solicitations

Submit RFP

Submit Vouchers for Payment

Communicate with Departments

# General Functions and Roles



# iSupplier Site

- ❑ Registration
- ❑ Finding and Responding to RFP's
- ❑ Training Information and Alerts

[HTTP://WWW.CITYOFCHICAGO.ORG/EPROCUREMENT](http://www.cityofchicago.org/eProcurement)



# Registration and Requirements

## All vendors must have:

- Federal Employer Identification Number (FEIN)
- IRS W9 for registration and confirmation of vendor business information.
- **Vendor Names MUST MATCH Articles of Incorporation**

**New Delegates /Grantee and Existing Delegate Agencies**

[https://www.cityofchicago.org/city/en/depts/dps/isupplier/  
endor-registration.html](https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.html)

# iSupplier Portal

[Home](#)   [Login and Registration](#)   [Current Bids and Solicitation Opportunities](#)   [Online Training Materials](#)   [Delegates](#)   [Help](#)

## Vendor Registration

There are TWO separate processes for registration as a vendor in the City's iSupplier Portal. It is important that your firm determines which process you should follow and that you read all the instructions below.

### Existing City of Chicago Vendors

If your business has previously registered with the City, had a contract (excluding subcontracts) or received a payment from the City, your firm should follow the process directly below. The following are **NOT** included in this group:

- Vendors who have only had contracts with Sister Agencies, as opposed to with the City of Chicago. Contracts with the following Sister Agencies would not qualify for previous registration with the City of Chicago:
  - Chicago City Colleges
  - Chicago Housing Authority
  - Chicago Park District
  - Chicago Public Schools
  - Chicago Transit Authority
  - Metropolitan Pier & Exposition Authority (MPEA)
  - Public Building Commission
- Vendors who have done business only with Cook County, but not with the City.

In order to register your business in the City of Chicago iSupplier Portal, you will need to send an email to [eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org) with the subject "**Request an iSupplier Invitation**", or click on the button below. Within two business days, you will receive an e-mail invitation from the City that provides a link to the iSupplier website and instructions for filling out and submitting your registration.

[REQUEST ISUPPLIER INVITATION](#)

[How to register after receiving registration invitation](#)

### New Vendors with the City of Chicago

Vendors who have never previously registered with the City of Chicago, never received a payment from the City of Chicago or never had a contract with the City of Chicago should follow this process. Click the New Vendor Registration button below; it will take you to the registration page in the iSupplier Portal where you can complete the process.

*If during registration you receive an error message stating that a supplier with the same name or the same FEIN number already exists, your business already has a City vendor number and you should follow the above "**Registration for Existing City of Chicago Vendors**" process.*

[NEW VENDOR REGISTRATION](#)

[How to Register](#)

**In either case, if more than one person at your business will use iSupplier, please add them as "contacts" and check "Create User Account For The Contact" next to each contact. This will create separate iSupplier login accounts for each user.**

# NEW USER REGISTRATION ONLY

Basic Information

Company Details

Additional Information

Attachments

## Prospective Supplier Registration

\* Indicates required field

Step 1 of 4 [Next](#)

Welcome to the City of Chicago iSupplier Registration portal. Here you can register for an iSupplier login account. Upon approval by the City, you will have access to iSupplier to respond to bids, RFPs and RFQs and to view orders and payments from the City.

1. Please enter the full legal name of your company. Your FEIN is required.
2. Your email address will become your login user ID.
3. The system times out after approximately 30 minutes of inactivity, so please click "Save for Later" after each screen to avoid losing your work.

## Company Details

At least one tax id is required to be able to complete the registration request.

\* Company Name

Tax Country  

Where provided, the tax country will be used to validate the format of the Tax Registration Number and/or Taxpayer ID.

\* FEIN

Format: XX-XXXXXX

DUNS Number

## Contact Information

At least one contact is required for your company. Additional contacts may be added on the next page.

\* Email

\* First Name

\* Last Name

\* Phone Area Code

\* Phone Number

Format: XXX-XXXX

Phone Extension

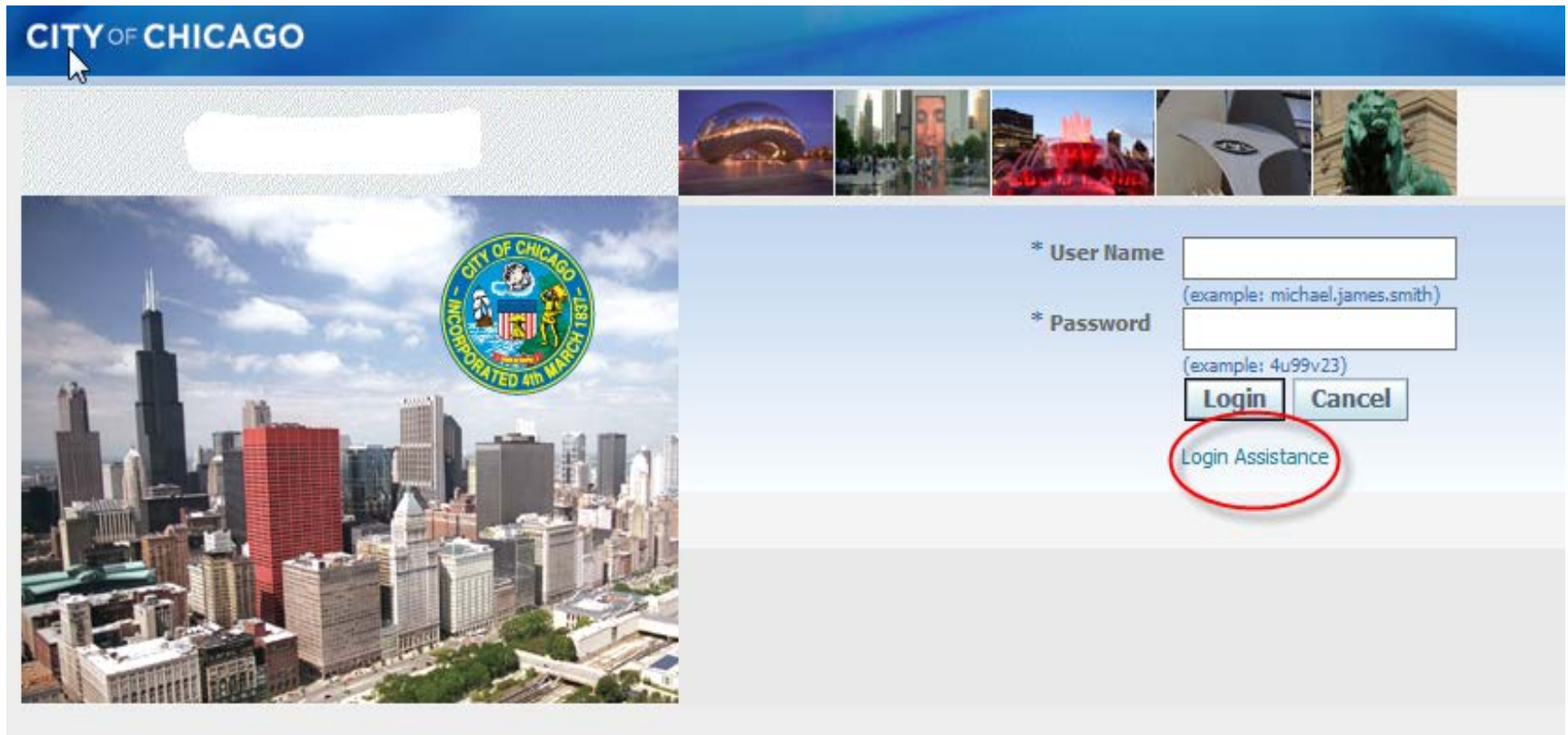


# ISUPPLIER PORTAL OVERVIEW

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# Login

- Self Management – Password Resets



# iSupplier Homepage

## Main Menu:

- **1** Invoice Creation
  - Contracts
  - View Payments and Create Vouchers
- **2** Respond to RFP

## Worklist:

- RFP Draft
- Online Messaging
- Addendum Updates/Notification

CITY OF CHICAGO E-Business Suite: SAPHIRE

Enterprise Search All [Go] Search Results Display Pr

Oracle Applications Home Page

**Main Menu** Personalize

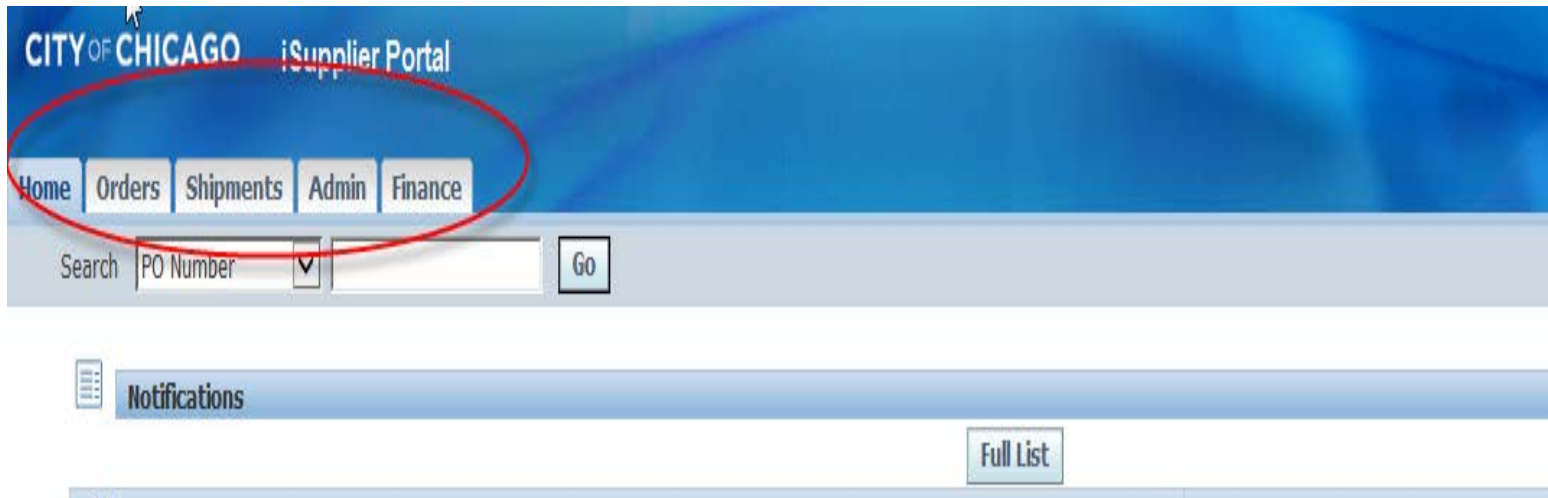
- City of Chicago iSupplier Portal with
  - Invoice Creation** 1
    - Home Page
  - City of Chicago Online Bidding 2
    - Sourcing
      - Sourcing Home Page
      - Worklist

**Worklist** Full List

From	Type	Subject	Sent	Due
There are no notifications in this view.				
✓ TIP		Vacation Rules - Redirect or auto-respond to notifications.		
✓ TIP		Worklist Access - Specify which users can view and act upon your notifications.		

# iSupplier Portal

- **Home:** Main Menu
- **Orders:** All History of Approved Contracts and Releases (**Real-time**)
- **Admin:** Agency Contact Information, Addresses, and Document Uploads
- **Finance:** View Vouchers, View Payments, and Create Invoices (**Real-time**)



*\*Actual Copies of Contract and Payment Information are Only Available for Items Initiated in iSupplier (eProcurement)*

# Admin Portal

**CITY OF CHICAGO** iSupplier Portal

Home Orders Shipments **Admin** Finance

Home Logout Preferences

**Profile Management**

- General**
- Company Profile
  - Organization
  - Address Book
  - Contact Directory

**General**

Organization Name **Chicago Test Vendor** DUNS Number **1234567890**  
 Supplier Number **1021758** FEIN **12-4356789**  
 Alias  
 Parent Supplier Name Country of Tax Registration  
 Parent Supplier Number

**Attachments**

**Search**

Note that the search is case insensitive

Title

[Show More Search Options](#)

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
<a href="#">Insurance Certification Expires 2018.09</a>	File	General Liability	From Supplier		29-Sep-2017	One-Time			

# General Requirements

All Delegate Agencies are required to upload and maintain an active status for the following documents in the iSupplier portal:

- ❖ Articles of Incorporation
  - ❖ Insurance
- ❖ SAM Registration Status
- ❖ State Good Standing Letter
  - ❖ Board of Directors
- ❖ Financial Statements (updated annually)
  - ❖ Signature Authorizations
- ❖ Cost Allocation Plan (*if indirect cost is included*)

# BIDDING – RFP REVIEW

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# iSupplier Online Bids

Login

## City of Chicago eProcurement Solicitations



Details

Document PDF File

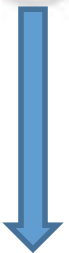
To view or download solicitations without logging in, click the icon at the Online Bid link, then click [www.cityofchicago.org/eProcurement](http://www.cityofchicago.org/eProcurement). For non-eProcurement bids, visit [www.cityofchicago.org/bids](http://www.cityofchicago.org/bids) to open. To sort the listing by a specific column, click on the desired column header. For registration to bid and more information, visit [www.cityofchicago.org/eProcurement](http://www.cityofchicago.org/eProcurement).

### Abstracts

Status: Active

Department Name	Event	Program/Model Number	Solicitation Number	Specification Number	Solicitation Title	Advertisement Date	Supplier Response Start Date	Supplier Response Due Date	Protected Markets	Deadline for Questions	Details
DEPT OF STREETS & SANITATION	Commodities	36,3	131019		131019: INTERIOR, EXTERIOR PAINTS AND SUPPLIES	30-MAY-2017 08:00:00	30-MAY-2017 08:00:00	02-AUG-2017 11:00:00		16-JUN-2017 16:00:00	oo

Details  
Login



Delegate Agency



# View and Respond to RFP

CITY OF CHICAGO Sourcing

Home Navigator Favorites

Negotiations

Negotiations >

Active Solicitations

Search

Note that the search is case insensitive

Number 57

Title

Category

Go Clear

Contact

Line

Event

Select Negotiation: Respond

Select	Number	Title	Contact	Time Left	Close Date	All Responses	Your Company's Responses
<input type="radio"/>	57	SMOKING CESSATION SERVICES FOR ADULTS	McGaughy, Ryan	402 days 16 hours	31-Aug-2018 10:57:45	Blind	0

[Return to Negotiations](#)

View All Attachments

Solicitation Number

# Respond to RFP

The screenshot shows the City of Chicago Sourcing interface. At the top left, it says "CITY OF CHICAGO Sourcing". On the right, there are navigation links: "Home Logout Preferences Help", "Navigator", and "Favorites". Below the header, there is a breadcrumb trail: "Negotiations > Active Solicitations > RFQ: 57".

In the top right corner, there is an "Actions" menu with a dropdown arrow and a "Go" button. The "Create Quote" option is selected in the dropdown, and this entire area is circled in red.

The main content area displays the following information:

- Title: **SMOKING CESSATION SERVICES FOR ADULTS**
- Status: **Active**
- Time Left: **402 days 16 hours**
- Supplier Response Start Date: **21-Jul-2017 10:59:24**
- Bid Opening Date/Supplier Response Due Date: **31-Aug-2018 10:57:45**

Below this information is a horizontal menu with four tabs: "Header", "Lines", "Controls", and "Contract Terms". The "Header" tab is selected and circled in red.

At the bottom of the main content area, there is a section with the following details:

- Buyer: **McGaughy, Ryan**
- Quote Style: **Blind**
- Description: **SMOKING CESSATION SERVICES FOR ADULTS**
- Outcome: **Delegate Agency Blanket Agreement**
- Event: **Delegate Agency**

At the very bottom left, there is a "Terms" link.

# Respond to RFP

Title SMOKING CESSATION SERVICES FOR ADULTS Time Left **402 days 16 hours**  
 Bid Opening Date/Supplier Response Due Date **31-Aug-2018 10:57:45**

Header Lines

Supplier **KWM PADITS**  
 RFQ Currency **USD**  
 Quote Currency **USD**  
 Price Precision **Any**

Quote Valid Until    
(example: 24-Jul-2017)  
 Reference Number   
 Note to Buyer

**Attachments**

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								






**Requirements**

[Expand All](#) | [Collapse All](#)

Focus Title	Target Value	Quote Value
<input type="checkbox"/> Requirements <input checked="" type="checkbox"/> Contact		
First Name		<div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> <p style="text-align: center; font-weight: bold;">4,000 Text character Limit</p> </div>
Last Name		<div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> </div>

# Respond to RFP

Title SMOKING CESSATION SERVICES FOR ADULTS

Header		Lines	
Line	Update	Quote Price	Unit
1 <a href="#">0005 - Personnel</a>		11200	USD
2 <a href="#">0044 - Fringe Ben...</a>		1200	USD
3 <a href="#">0100 - Operating/...</a>			USD
4 <a href="#">0140 - Profession...</a>			USD
5 <a href="#">0200 - Travel</a>			USD
6 <a href="#">0300 - Materials ...</a>			USD
7 <a href="#">0400 - Equipment</a>			USD
8 <a href="#">0801 - Indirect</a>			USD
9 <a href="#">0999 - Other</a>			USD

RFQ Currency **USD**  
Price Precision **Any**

 Indicates more information requested. Click the Update icon to see more information on alternate bids, if applicable.

# Electronic Signature



## Electronic Signature

By submitting a bid/proposal/application and inputting his/her name and title, the person signing below certifies that he/she is authorized to submit this bid/proposal/application on behalf of the submitting party and warrants that all certifications and statements contained in the bid/proposal/application are true, accurate and complete as of the date furnished to the City. The person signing below understands that this submission will be binding on the submitting party.

\* Name:

\* Title:

\* Indicates required fields. Before submitting the response please enter Name and Title and accept the disclaimer by checking the box above.

Cancel

Back

Validate

Save Draft

Printable View

Submit

# Addendums and Notifications

- Addendum - Solicitation Number will be amended with a (zzzz,1)

Oracle Applications Home Page > Worklist >

**Information**  
This notification has been closed and did not require a response.

**Acknowledgement Required: Amendment 1 to RFQ 58 (SMOKING CESSATION SERVICES FOR ADULTS)**

From	<b>McGaughy, Ryan</b>	Company	<b>The City of Chicago</b>
To	<b>JANE DOE</b>	Title	<b>SMOKING CESSATION SERVICES FOR ADULTS</b>
Sent	<b>25-Jul-2017 13:42:15</b>	Number	<b>58,1</b>
Closed	<b>25-Jul-2017 13:43:06</b>		
ID	<b>97018347</b>		

Responder

Negotiation Open **July 25, 2017 12:44 pm Central Time**  
Negotiation Close **October 31, 2017 10:00 am Central Time**  
Supplier **CITY OF CHICAGO TEST SUPPLIER**  
Supplier Site

This Negotiation has been amended. To be considered for award you must acknowledge each amendment and resubmit your responses.

Please go to [Review Changes](#) page to review the changes for this amendment.

[Return to Worklist](#)

Display next notification after my response

# Helpful Reminders

- Administration of Organizational Information – Maintain Updated and Accurate Information
- *Avoid clicking the Back/Forth browser buttons – Navigate through iSupplier site*
- *Updating Agency Information and User Access – Remember to Enter Email Address Before Granting Access to Organizational Users .*
  - *Assign Proper Responsibilities (Online bidding and/or Invoicing)*

# Helpful Reminders

- Online Discussion Sent to Buyer Only
- Save Draft Often
- Check Attachment Submissions Prior to Submitting RFP
- Click Validate Prior to Submission - To Identify Missing Requirement
- Prior to Submitting – **Enter Name First THEN Click Certify**



# Who to Contact for Assistance

- **Questions on Registration:**

[eprocsupport@cityofchicago.org](mailto:eprocsupport@cityofchicago.org)

- **eProcurement for Delegate Agencies:**

[OBMGMU@cityofchicago.org](mailto:OBMGMU@cityofchicago.org) or (312) 744-0358

- **Training Materials (Documents and Videos):**

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/online-training-materials.html>

# Useful Links

## **City of Chicago Search Online:**

<http://webapps.cityofchicago.org/VCSearchWeb/org/cityofchicago/vcsearch/controller/agencySelection/begin.do>

## **Vendor/Delegate Agency Registration:**

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.html>

## **Funding Opportunities:**

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/current-bids.html>