

# Hatchuel Tabernik & Associates Inc.

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## Proposal

**Date:** February 13, 2014  
**To:** Rebecca Lacocque, SLzUSD, on behalf of East Bay I-880 Career Pathways Consortium  
**From:** Tim Tabernik, President  
**RE:** California Career Pathways Trust Grant Writing Services

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Hatchuel Tabernik & Associates is an independent consulting firm that provides cost-effective, high-quality services for public agencies, educational institutions, nonprofit organizations, charitable foundations, and health care organizations. HTA's team is headquartered in Berkeley, CA.

At HTA our mission is *to support and empower organizations to create a more healthy, educated, equitable and just society*. We accomplish our mission by supporting agencies, especially those working at the intersection of public and private systems, to improve the lives of children, families, and community. We have assembled an extraordinary team of professionals who are dedicated to the HTA mission and who consistently apply their expertise and experience as writers, planners, trainers and evaluators to develop and strengthen important community change initiatives.

Our deep understanding of social services, physical and behavioral health, workforce development and early childhood, K-12 and higher education enables HTA to support systems improvement, program development, and collaboration in these sectors. Our technical skills ensure that all our services are delivered with high quality and attention to best practices.

### Our Services

- Evaluation and Research
- Grant and Technical Writing
- Strategic, Business, and Community Planning
- Training and Technical Assistance

### Our Professional Philosophy

HTA provides results-oriented consultation. We are experts at delivering products and services that are both methodologically-rigorous and accessible to a diverse stakeholder audience. We serve traditionally under-represented and under-served communities and individuals with products and services that are accessible and useful to them. Our team works flexibly to adjust to changing circumstances and needs – while building the capacity of our clients and making organizations stronger.

## Our Projects

HTA grant writers have raised more than \$375 million in public investments including funding from the following programs:

- Race to the Top District (\$29 million)
- Investing in Innovation (\$26 million)
- Promise Neighborhoods (\$25 million)
- 21st Century Community Learning Centers (\$116 million)

HTA grant writers have written many successful grants for career pathways projects. Examples include:

- Quick Start Partnerships grants for a large consortium of community college and K-12 school districts and business community partners
- Smaller Learning Communities implementation grants for five school districts
- A Business Plan and grant for the Foundation for California Community Colleges, Center for Professional Learning. This effort supported the development of career pathways statewide with the assistance of the William and Flora Hewlett Foundation.

HTA training and planning staff have completed many assessments and planning projects:

- Evaluation capacity building for the Haas Center for Public Service, Stanford University
- Planning and facilitation of countywide Mental Health Service Act
- Planning of Promise Neighborhoods and other place-based, collective impact initiatives
- Strategic plans for two Northern California First 5 Commissions

HTA evaluators have completed scores of program evaluations, including:

- After-school and school-based educational and student support programs
- Statewide evaluation of the School Assistance and Intervention Team (SAIT) program
- Centers for Disease Control and Office of Minority Health: *Proyecto Movimiento* place-based health initiative
- Evaluations of criminal justice reform programs funded by the U.S. Department of Justice, Office of Justice Programs and California Department of Corrections and Rehabilitation

## Successful grant writing is a collaborative process

We work with our clients to identify funding opportunities that are most likely to be consistent with their organizational goals. We carefully evaluate and balance the funder's technical requirements with our client's goals and capacity.

We often facilitate program planning and collaboration among participating agencies and help clients adopt best-practice programs and innovations that enhance their services and strategies. Our grant writers spend time with clients to get an accurate feel for each organization in order to ensure that our grants capture their qualities and context. In this process we also ensure that, once funded, the agency has the capacity to deliver on its grant commitments.

### Areas of Success

- ✓ Pre K-16 Education
- ✓ Career Technical Education
- ✓ Workforce Development
- ✓ Technology
- ✓ Social Services
- ✓ Mental Health
- ✓ Violence Prevention
- ✓ Criminal & Juvenile Justice

## Our Approach to Grant Writing

We provide full service grant-writing, final editing, or targeted technical assistance designed to build the grant writing skills of our clients and ensure the most effective and efficient use of HTA services. Through years of experience HTA has developed systems to create proposals that are both technically correct and compelling. From interpreting the nuances of an RFP through facilitating multi-agency grant planning processes, budget development, research on best practices and exemplary programs, narrative construction, and completion of required forms, to submitting a final application, HTA has thought through every step and provides quality assurance on what is often a complex and demanding process.

We draw on the expertise of our entire staff when planning and crafting competitive grant proposals. For instance, if a project requires or envisions a community needs assessment process, our grant writers call on our planning team to help outline a process that meets our client's needs within the funder's parameters. Our evaluation team designs and writes evaluation plans for grant proposals ranging from basic data collection and analysis to sophisticated multi-year experimental or quasi-experimental designs; assists with data analysis and presentation; and consults on content areas of expertise and on crafting meaningful, measurable process and outcome objectives. Our collaborative approach and breadth of skills allow us to build well-thought-out, realistic grant packages that capture readers' interest and set the stage for effective implementation.

I would like you to know how much [My Team] and I appreciated HTA's work with us on the i3 grant. As you know, it was a very challenging grant, and certainly the most ambitious we have ever tried to conceptualize, pull together and write. Having HTA work with us on it was incredibly helpful. The combination of your ability to ask really good questions to sharpen our thinking, your grant writing expertise, and your team's willingness to go above and beyond a regular work day to get the job done was a terrific combination. And in addition, you were fun to work with!

*Ruth Schoenbach Co-Director  
Strategic Literacy Initiative/WestEd*

We have established a reputation for fairness, high performance, and results-oriented consultation. Our Return on Investment (ROI) is extremely high. HTA's average ROI on government grants is 5,998%: \$60 gained per dollar spent. 92% of the clients with whom we have developed a long-term working relationship have seen a positive return on the funds they "invest" with HTA.

<b>Return on Investment (ROI) is money gained divided by money spent</b>			
Approximate average HTA ROI for federal, state, and local government grants:			5,998%
<b>A Representative Sample of HTA Clients</b>	<b>Grants Written</b>	<b>Dollars awarded for each dollar spent</b>	<b>ROI</b>
Mid-sized youth dev. non-profit (client since 2004)	72	\$ 36	3543%
Workforce development agency (client since 2004)	9	\$ 71	7033%
County probation department (client since 2005)	9	\$ 33	3175%
YMCA branch (client since 2004)	12	\$ 147	14562%

*Note: For perspective, venture capitalists, who demand a high return on their investments, demand an ROI of 1000-3000%*

### Grant Writing Team

**Tim Tabernik**, co-founder and President of HTA, has written grant proposals that have raised more than \$80 million for our clients. His extensive experience in the nonprofit and public sectors, and longstanding relationships with many key contacts, consistently bring significant value to our clients' fundraising efforts. HTA Grant Team Manager **Randy Malat, MA, MS**, has written successful grant proposals that have raised over \$120 million in funding for school districts, city and county governments, community colleges, and non-profit organizations in the Bay Area since 2001. **Jayne Williams, MA**, Senior Associate, has written successful grant proposals in the Bay Area since 1996, raising over \$155 million in funding for city and county governments, school districts, workforce investment organizations, and non-profit organizations. **Sara Sherman, MBA**, Grants Coordinator, brings extensive experience with operations, marketing, financial and project management and provides coordination, grants research and project management support to HTA's busy grant writing team.

### Planning Team

Our planning team for this project is comprised of **Lori Allio, PhD**, Senior Associate and Director of Planning and Training and **Kendall Heaton, MSW**, Associate. Lori has more than 20 years of experience with foundations, nonprofits, governments and multilateral organizations as a manager, planner, facilitator, trainer, and researcher. Her expertise encompasses several fields including health, workforce development, community development, neighborhood revitalization, migration, political economics, public policy, and evaluation. Kendall has over 12 years of experience as an educator and social worker committed to the process of creating vibrant communities and integrated support systems that allow children, families and communities to thrive. Kendall has provided program planning, coordination, evaluation, and analysis for community-based organizations, school districts, and foundations.

### Description of Project

We propose to assist the 880 corridor partners to plan and prepare a competitive California Career Pathways Trust grant application with a deadline of March 28, 2014.

**HTA will deliver the following:**

- Planning Assistance
- Partner Meeting Facilitation/Planning (at least 6 meetings)
- Program Narrative Grant Writing
- Budget Development
- Budget Narrative
- Draft Letters of Agreement/MOUs
- Application Forms
- Editing and Formatting
- Assistance with attachments
- Quality Assurance
- Packaging and Submitting

**Client is responsible for the following:**

- Signatures on all forms and letters
- Needs data
- Organizational capacity information
- Program design information
- Budget information
- All required attachments
- Timely review of all narratives, budgets and other materials
- Registration on the Faast online system in a timely manner
- *Delivery of all final materials 48 hours prior to the deadline\**

**Fees**

Assuming that there is no substantive change in the scope of work, you will be billed one lump sum for the above grant writing services. We ask you to provide 50% of the fee upon contracting for these services. The flat fee is based on the following cost estimates:

<b>Fee Structure</b>	<b>Flat Fee</b>
<b>Full fee</b>	<b>\$ 35,425</b>
<b>Due Upon Contracting</b>	<b>\$17,713</b>

Activity	Total Hours	Total Cost
<b>Start Up</b>		
Project Launch/Communication		
Background Materials Review		
RFP Review		
<b>Subtotal</b>	<b>34.75</b>	<b>\$4,281</b>

**Grant Writing & Budget**

**Program Planning**

Program design development  
 Planning assistance leading to deliverables for grant proposal, including helping the project leads:

- Develop agendas for Work Team meetings
- Facilitate Work Team meetings
- Develop templates for gathering proposal information from the partners (e.g., existing career pathway programs, programs of study, business partnerships, support services, gaps in services)
- Develop attachments using data visualization (to present important information that can't go into the grant narrative)
- Define partner roles and responsibilities
- Develop MOUs among partners as needed

Activity	Total Hours	Total Cost
<ul style="list-style-type: none"> <li>Facilitate decision making by the Executive Steering Committee</li> <li>Design the budget so the consortium is positioned to sustain career pathways by year 4 or 5 of the grant period</li> <li>Identify resources the grant would leverage</li> <li>Articulate with the I-680 grant process to maintain consistency and alignment</li> </ul>		
<b>Subtotal</b>	<b>124</b>	<b>\$15,450</b>
<b>Grant Writing/Development</b>		
Grant Writing Narrative (equivalent of about 18 single spaced pages)		
Needs Data Research		
Background Research		
Editing/Formatting/QA		
Meetings/Communication		
Project/Timeline Management		
<b>Subtotal</b>	<b>90.75</b>	<b>\$11,019</b>
<b>Budget (Optional)</b>		
Budget Development		
Budget QA and Formatting		
Budget Narrative		
<b>Subtotal</b>	<b>21</b>	<b>\$2,225</b>
<b>Forms, Attachments, and Supporting Documentation (Optional)</b>		
Application Forms		
Assistance with Attachments		
Project/Timeline Management		
<b>Subtotal</b>	<b>19</b>	<b>\$1,750</b>
<b>Packaging and Submitting (Optional)</b>		
Packaging & Submitting		
Project/Timeline Management		
Quality Assurance		
<b>Subtotal</b>	<b>8</b>	<b>\$700</b>
<b>Total Cost</b>	<b>298</b>	<b>\$35,425</b>

Pricing of services is calculated based on:

Principals	\$150/hr
Senior Associate	\$125/hr
Associate	\$100/hr
Project Coordinator	\$ 75/hr
Administrative/Project Assistant	\$ 50/hr

## Conclusion

We welcome the chance to work with you on this project, and thank you for the opportunity. If you have further questions, please feel free to contact me at your convenience.