

REQUEST FOR PROPOSALS (RFP)

Issue Date: April 18, 2017  
Title: Comprehensive Grant Services

RFP#LU214-17-013  
Commodity Code: 96190

Issuing Agency: COMMONWEALTH OF VIRGINIA  
Longwood University  
Materiel Management and Purchasing  
201 High Street, Lancaster Hall, Room 207A  
Farmville, Virginia 23909

**OPTIONAL PRE-PROPOSAL CONFERENCE**

11:00 a.m., April 28, 2017  
Lancaster Hall, 2<sup>nd</sup> Floor, Room 223  
Longwood University  
Farmville, Virginia 23909

Location Where Work Will Be Performed: Longwood University, Farmville, Virginia 23909

Initial Period Of Contract: July 1, 2017 through June 30, 2018. Optional four (4) successive one (1) year renewal periods.

**Sealed Proposals Will Be Received Until: May 9, 2017 at 2:00 p.m. Local Time For Furnishing The Goods/Services Described Herein. Proposals Shall Be Date/Time Stamped By The University Upon Receipt.**

All Inquiries For Information Should Be Directed To: Cathryn B. Mobley, Associate Vice President for Administration and Finance, using ATTACHMENT A – WRITTEN PRE-PROPOSAL QUESTION FORM emailed to [materielmanagement@longwood.edu](mailto:materielmanagement@longwood.edu) or faxed to (434) 395-2246. Questions are due by 12:00 noon on May 2, 2017.

**IF PROPOSALS ARE MAILED OR HAND DELIVERED, SEND/DELIVER DIRECTLY TO ISSUING AGENCY SHOWN ABOVE.**  
**Note: If you use an express delivery service, you may be told the University is a next day delivery location, but make sure the carrier guarantees delivery by 2:00 p.m.**

In Compliance With This Request For Proposals And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation.

State Corporation Commission (SCC) ID#: T0670606 or statement describing why offeror is not required to have a SCC ID# must be furnished with your proposal.

eVA Member: [ X ] Yes [ ] No  
eVA Vendor ID#: VS0000087501

Check all that apply: Small Business [ ]  
Woman-Owned Business [ ]  
Minority-Owned Business [ ]

**Note: Offeror shall be a member of eVA on the Date and time designated for receipt of proposals to be awarded this contract. See General Terms and Conditions X for information on registration.**

DSBSD Certificate Number \_\_\_\_\_  
Certification Date \_\_\_\_/\_\_\_\_/\_\_\_\_  
Expiration Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Name And Address Of Firm:

McAllister & Quinn LLC

1030 15th Street NW, Suite 590 West

Washington, DC

Zip Code

E-mail: dgrenham@jm-aq.com

Phone: ( 202 ) 966-4744

(Toll Free, if available)

RFP#LU214-17-013

Comprehensive Grant Services

Date: May 4, 2017

By: 

(Signature In Ink)

Name: E. David Grenham

(Please Print or Type)

Title: Vice President of Business Development

Fax: ( 202 ) 296-2751

(Toll Free, if available)

## COVER LETTER

LONGWOOD UNIVERSITY / MATERIEL MANAGEMENT AND PURCHASING  
201 HIGH STREET  
LANCASTER HALL, ROOM 207A  
FARMVILLE, VIRGINIA 23909

May 4, 2017

Re: REQUEST FOR PROPOSAL #LU214-17-013  
COMPREHENSIVE GRANT SERVICES

On behalf of McAllister & Quinn, we are pleased to submit the following proposal for comprehensive grant services to Logwood University.

As illustrated in our proposal, our substantial experience successfully representing similar institutions of higher education, as well as our personal experience working with Longwood University in the past, will help us to achieve Longwood University's goals and objectives.

The point of contact and authorized employee for this proposal is:

David Grenham  
Vice President of Business Development  
McAllister & Quinn LLC  
1030 15<sup>th</sup> Street NW, Suite 590 West  
Washington, DC 20005  
Office Phone: (202) 296-2741 Ext. 1023/ Mobile Phone: (202) 445-3133  
Fax: (202) 296-2751  
Email: [dgrenham@jm-aq.com](mailto:dgrenham@jm-aq.com)

Thank you for your consideration of this proposal.

Sincerely,



David Grenham  
Vice President of Business Development

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## 2. OFFEROR DATA SHEET (ATTACHMENT C)

The Offeror Data Sheet, Attachment C, Follows this page.

**ATTACHMENT C – OFFEROR DATA SHEET (TO BE COMPLETED BY OFFEROR AND RETURNED WITH PROPOSAL)**

- A. **Qualification of Offeror:** The Offeror must have the capability and capacity in all respects to fully satisfy all of the contractual requirements. Indicate below the length of time you have been in business providing the goods/services required herein.

12 Year(s) 6 Month(s)

- B. **References:** List three (3) contacts (preferably a college or university if available) for whom you have provided this type of goods/services that the University has your permission to contact.

1. Cabrini University, PA / Don Taylor, President  
Company/Name of Contact Person  
610 King of Prussia Rd, Radnor, PA 19087  
Address  
(610)-902-8200 08/1/2014 -- Current  
Phone Number Date(s) of Service  
dbt27@cabrini.edu  
Email Address
2. Fontbonne University, MO / Mike Pressimone, President  
Company/Name of Contact Person  
6800 Wydown Blvd., St. Louis, MO, 63105  
Address  
(314)-889-1419 01/01/2015  
Phone Number Date(s) of Service  
mpressimone@Fontbonne.edu  
Email Address
3. Saint Leo University / Denny Moller, Vice President for Advancment  
Company/Name of Contact Person  
33701 State Road 52, Saint Leo, FL 33574  
Address  
352-588-8644 08/01/2013  
Phone Number Date(s) of Service  
denny.moller@saintleo.edu  
Email Address

### 3. WRITTEN NARRATIVE

**a. Experience in providing the goods/services described herein emphasizing experience working in conjunction with small liberal arts, public institutions, and college/university faculty, staff, and administrators.**

McAllister & Quinn is a consulting firm located in Washington, DC. We offer a range of higher education consulting services concentrating on increasing the strategic focus of a college or university with the goal of expanding its external funding efforts through federal grants and foundations. We currently represent approximately 60 colleges and universities from across the nation. Our specialty is working with small and mid-sized public and private liberal arts institutions to add capacity, expertise, and strategic focus to their grant seeking efforts. Through the utilization of our successful grant model and an emphasis on faculty development, we have secured more than \$200 million for our clients in grant and foundation funding since 2011.

**b. Experience working with university Sponsored Program offices and in preparing project applications that are compliant with Federal, State, and Local regulations.**

McAllister & Quinn has extensive experience working with Sponsored Program offices, grant staff, and faculty to identify strategic federal grant and foundation opportunities, prepare in advance for these opportunities, develop compelling program designs, and work collaboratively to prepare highly competitive grant applications. We have worked with Longwood University in the above capacity from March, 2015 – March 2017. During this time, we worked directly with various Longwood staff, administration, and faculty, including Regina Maldve, Director of Office of Sponsored Programs, Dr. Larissa Ferguson, Associate Provost for Outreach Programs & Initiatives, and Dr. Joan Neff, Provost and Vice President for Academic Affairs. Working collaboratively, we submitted eight competitive federal grant applications. One of these applications, the Scholarships for STEM grant (SSTEM) was funded for \$650,000. Five applications are pending, with an outstanding potential of \$2.1 million in funding.

**c. Names, qualifications, and experience of personnel to be assigned to the project. Identify primary contact(s) and specific subject matter experts in the arts, humanities, social sciences, and natural sciences.**

The higher education team at McAllister & Quinn brings considerable experience and expertise to our collaborative work with colleges and universities. Our team includes former senior higher education professionals who have significant experience working as faculty and administrators. In addition, we have experienced government relations experts who have worked at the senior levels of Congress and the Executive Branch. As a result, the firm has significant relationships with key decision-makers in the federal government. The McAllister & Quinn approach is to become integrated members

of our college and university communities so that we can assist and support the faculty and administrations with broad strategic initiatives that enhance the mission of the institution.

In this case, Ellen Riddleberger, Vice President, and Annie Kurowski, Managing Director would continue to be the main points of contact for Longwood University. Both Ellen and Annie have extensive experience and a highly successful track record of working with higher education institutions. In addition to Ellen and Annie, support will continue to be provided by various McAllister & Quinn professionals with specific grant subject matter expertise, including Dr. Carol Burdsal who has extensive experience in the sciences and with the National Science Foundation (NSF) and National Institutes of Health (NIH); Dr. Susan Faulkner, who has funding experience with the Department of Education, NSF, NIH, and the Department of Agriculture; and Marianne Jordan, whose expertise is in grant project design, the Arts and Humanities (NEA and NEH), and foundations. More complete information is included in the resumes in “Section d.” on the following pages.

**d. Resumes of staff members who will be the primary contacts to Longwood University.**

**Ellen Riddleberger**

Vice President

Ellen Riddleberger is a Vice President at McAllister & Quinn, managing an impressive array of clients including institutions of higher education and nonprofit organizations. She specializes in helping clients increase their external funding through federal funding, government grants, and foundations, as well as providing strategic government affairs analysis and advocacy services.

Prior to joining McAllister & Quinn, Ellen worked for Congresswoman Lucille Roybal-Allard (D-CA) for more than 11 years, and as her Chief of Staff since 2002. Congresswoman Roybal-Allard is a senior member of the House Appropriations Committee and a former Chair of the Congressional Hispanic Caucus. During her tenure with Congresswoman Roybal-Allard, Ellen worked on the Appropriations, Budget, and Financial Services Committees, as well as handled a broad spectrum of issues, including education, health, labor, criminal justice, national security, and women's and children's issues. In addition, she served as professional staff for various select committees, held a top secret security clearance, served in a leadership role organizing the annual Congressional Bi-Partisan Retreat for Members of Congress, and was active in various House Leadership elections and campaigns.

Ellen is a native of Sacramento and earned her B.A. in political science at California Polytechnic State University, San Luis Obispo and her M.A. in political science from Stanford University. She is active in national and local politics, volunteers for multiple area nonprofits, and serves on the Board of Directors of the National Women's Hall of Fame.

**Affiliations**

- Board Member, National Women's Hall of Fame
- Member, House of Chiefs of Staff Alumni Association
- Member, Friedrich Naumann Foundation, Transatlantic Dialogue Program

**Selected Publications and Events**

- Discussion Leader: "The Rise of Populism on Both Sides of the Atlantic," Friedrich Naumann Foundation Conference: The Current State of Transatlantic Relations: An Assessment. Chicago, IL, 2016.
- Featured Speaker: "From Prospecting to Program Design: How to Identify and Win Grants to Meet Your Institution's Goals and Objectives", US National Marine Animal Health and Stranding Network Conference, Shepherdstown, WV, 2016.
- Participant, Study Tour, Friedrich Naumann Foundation, Transatlantic Dialogue Program for Political Professionals: Europe's and Germany's Economic, Political, Challenges and Opportunities, Belgium and German, 2015.
- Conference Speaker: "Federal Grants 101," YWCA USA National Conference. Lihue, HI, 2012.
- Conference Speaker: "The Federal Budget and Appropriations Process," Hispanic Association of Colleges and Universities (HACU), Washington, DC, 2008.

**Annie Kurowski**

Managing Director of Grants and Federal Affairs

Annie Kurowski serves as Managing Director of Grants and Federal Affairs at McAllister & Quinn. Annie has more than fifteen years of experience working with clients, members of the Senate, state and local governments, and federal agencies.

Prior to joining McAllister & Quinn, she served as Deputy Director for Congressional and Legislative Affairs for the Corporation for National and Community Service (CNCS) and as an adviser to a nonprofit public health foundation based in Germany. Annie has extensive experience in federal and foundation grant prospecting, advising on grant program development and design, and coordinating and managing grant projects with offices of sponsored research at colleges and universities. She also has significant experience negotiating the legislative process and developing legislative strategy in partnership with higher education administrators and faculty, health care provider and patient associations, researchers and juvenile justice stakeholders. She previously served as Legislative Assistant for higher education and health policy for Senator Gordon H. Smith and research/professional staff on the Senate Committee on Health, Education, Labor and Pensions.

Annie is a native of Oregon and earned a B.A. from Oregon State University and an M.Sc from the London School of Hygiene and Tropical Medicine and the London School of Economics and Political Science.

**Affiliations**

Board Member, APRC Foundation, Germany

**Selected Publications and Events**

- Featured speaker: “From Prospecting to Program Design: How to Identify and Win Grants to Meet Your Institution’s Goals and Objectives”, US National Marine Animal Health and Stranding Network Conference, 2016.

**Carol A. Burdsal Ph.D.**

Managing Director of Grants and Federal Affairs

Dr. Carol Burdsal is Managing Director of Grants and Federal Affairs at McAllister & Quinn, where she assists clients to strategically pursue federal funding opportunities. Dr. Burdsal leverages her experience as a former faculty researcher, university grants administrator, and program director at the National Science Foundation (NSF) to provide clients with advice and support to develop relationships, identify appropriate funding opportunities, and apply for funding at federal agencies.

Prior to joining McAllister & Quinn, Dr. Burdsal was Assistant Provost for Research at Bucknell University, where she was instrumental in elevating the profile and efficiency of the Office of Sponsored Projects. As a principal investigator of numerous extramurally funded projects from agencies such as the National Institutes for Health (NIH) and the Centers for Disease Control (CDC), Dr. Burdsal offers a unique perspective to clients – that of a grant-seeking faculty member and an experienced grants administrator at both large, research-intensive institutions and smaller, predominantly undergraduate institutions (PUIs).

Before joining Bucknell, Dr. Burdsal served as Program Director at two NSF clusters in the IOS Division of the Directorate for Biological Sciences (BIO): the Physiological & Structural Systems and the Developmental Systems clusters, which support multidisciplinary research at the interfaces of biology, physics, chemistry, mathematics, computer science and engineering. BIO provides about 64 percent of federal funding for non-medical, basic research at academic institutions in the life sciences.

Prior to her public service at NSF and following a period of postdoctoral research at the University of California, San Francisco, Dr. Burdsal held several positions at Tulane University, including: Associate Dean for Academic Programs and Associate Dean for Undergraduate Programs at the School of Science and Engineering; Co-Director, Department of Cell and Molecular Biology Master of Science Graduate Program; and Associate Professor, Department of Cell and Molecular Biology. She earned her B.S. in biology from the University of Miami and then trained as a cell and developmental biologist at Duke University, where she earned her Ph.D. in 1990.

Dr. Burdsal's expertise also includes academic intellectual property (IP) issues. A Registered Patent Agent with the U.S. Patent and Trademark Office, Dr. Burdsal advises on the federal regulations that govern IP and assists institutions to develop effective education programs concerning the policies, practices, and practical understanding of the patent process, including best practices for faculty working with offices of technology commercialization. She provides technical and strategic advice on the process of technology transfer on a broad range of topics, including commercialization of IP, the crafting of invention disclosures, and best practices in conducting patent searches and understanding the various types of patent applications.

....CONTINUED – **Carol A. Burdsal Ph.D.**

#### **Affiliations**

- Member of Editorial Board, Developmental Dynamics
- Associate Editor, Journal of Experimental Zoology
- Member, American Society for Cell Biology

#### **Awards**

- American Heart Association, California Affiliate Postdoctoral Fellowship Award
- Research Award-Program in Analytical Cytometry, UCSF/Lawrence Livermore National Lab
- NIEHS Postdoctoral Traineeship, Laboratory of Radiobiology and Environmental Health, University of California, San Francisco, CA
- NIH Predoctoral Traineeship Grant, Duke University Cell and Molecular Biology Program

#### **Publications and Events**

Dr. Burdsal has authored and co-authored numerous presentations and peer-reviewed articles on a broad range of topics in professional journals such as Developmental Biology, the official journal of the Society for Developmental Biology; Development, a leading primary research journal in the field of developmental biology; Developmental Dynamics, a peer-reviewed scientific journal of the American Association of Anatomists, and many others. She has also been a workshop leader and presenter at various meetings of the National Council of University Research Administrators.

**Susan Faulkner, Ed.D.**

Executive Director of the Office of Grants Services

Dr. Susan Faulkner serves as Executive Director of Grant Services at McAllister & Quinn. She is responsible for identifying and assisting in securing federal agency funding for the firm's college and university clients. Dr. Faulkner provides clients with advice and support in developing relationships, identifying appropriate funding opportunities, and moving forward with applying for funding at federal agencies. Before joining McAllister & Quinn, Dr. Faulkner was Associate Director for Research Development at the Mary Babb Randolph Cancer Center at West Virginia University. She also held a similar position at the Virginia Bioinformatics Institute at Virginia Tech, where she was the Education and Outreach Officer.

Dr. Faulkner has spent the past 20 years working on and/or leading extramurally funded projects and has served as a principal investigator, Co-PI, or administrator of numerous extramurally funded projects that were funded by the National Science Foundation (NSF), National Institutes of Health (NIH), United States Department of Agriculture (USDA), and United States Department of Education (ED), as well as from private foundations.

Dr. Faulkner earned a B.S. from West Virginia Institute of Technology, an M.S. from Marshall University and a doctorate of education from Virginia Tech. She majored in education administration with a cognate in community college administration and business.

**Representative Publications and Events**

- Presenter, "NIH R15 Funding Mechanism," Faculty Workshop, 2013, Pennsylvania.
- Presenter, "Assisting Undergraduate Students Apply for NSF REU Opportunities on the National Level," Grants Workshop, Washington, DC, 2013.
- Presenter, "NIH Funding Opportunities for Beginners," Workshop, Washington, DC.
- Presenter, "The NSF Panel Review Process and NSF Funding Opportunities," Faculty Workshop, Ohio, 2012.
- Co-Author: Bonnie's Bus – cancer disparities in West Virginia, philanthropy and opportunities to build lasting partnerships. West Virginia Medical Journal.
- Co-Author: National sales and service skill standards help meet local needs. Workplace.
- Author: Benefits of integrating national skill standards into education and training curricula. The Catalyst.

**Marianne Jordan**

Managing Director of Grants Services

Marianne Jordan serves as Managing Director of Grants Services in the Higher Education Practice at McAllister & Quinn. In this role, she helps clients develop a comprehensive strategy for grant seeking and faculty development. She assists her clients to identify suitable federal and foundation grant opportunities that match their institutional and faculty strengths and needs. She works hand in hand with clients in the creative development of the grant opportunities and provides strategic advice on all aspects of the external funding process.

Before joining McAllister & Quinn, Marianne served as Director of Corporate & Foundation Relations at Bowdoin College in Brunswick, Maine (1997-2012). Prior to Bowdoin, she held comparable positions at Allegheny College (1989-1997) and Gallaudet University (1985-1989). Marianne has acknowledged expertise in working with faculty and college administrators to elicit great ideas and to convert those ideas into successful grant proposals. At all three institutions, Marianne improved the overall productivity of the grants office, greatly increasing the number of proposals submitted and funded by private foundations and federal agencies. She has raised millions of dollars through grant seeking for institutional priorities and faculty scholarship. Her expertise includes a deep understanding of the goals of private and government funding sources and the ability to match institutional strengths with funding priorities. She earned her bachelor's degree in English literature from the University of North Carolina at Chapel Hill and her master's degree in English language & literature from the University of Michigan. She has been an active volunteer and leader in her professional associations, the Council for the Support and Advancement of Education (CASE) and SCAFRO (Some Corporate and Foundation Relations Officers) and has published articles on grant seeking and foundation funding trends.

**Affiliations and Awards**

- Council for the Support and Advancement of Education (CASE)
- Some Corporate and Foundation Relations Officers (SCAFRO)

**Publications and Events**

- Panelist, "Building Bridges," How Foundations and Institutions of Higher Education Find Common Ground. Pre-Meeting Symposium: Integrating the Sciences, Arts, and Humanities: Global Challenges and the Intentional Curriculum. Annual Meeting of the Association of American Colleges and Universities/American Conference of Academic Deans, 2011.
- Author, "Funding Undergraduate Science Facilities: Telling a Powerful Story," Volume IV: What Works, What Matters, What Lasts. Project Kaleidoscope.
- Author, "New Patterns of Foundation Support," (Chapter) New Strategies for Educational Fund Raising. American Council on Education.
- Co-Author, "Effective Assessment and Institutional Change," Building Robust Learning Environments in Undergraduate Science, Technology, Engineering, and Mathematics. New Directions for Higher Education. Number 119, Fall 2002.

**e. Policy for security precautions with regard to client confidentiality and proprietary information.**

McAllister & Quinn takes client confidentiality and privacy of proprietary information extremely seriously and, as such, has developed extensive policies and appropriate firewalls to insure that no breaches take place. We do not share client information, including funding opportunity matrices, grant documents, drafts, concept papers, etc. without explicit consent from a client. Furthermore, we use an internal document management system with individual, protected, subsites for each client to insure privacy.

#### 4. SPECIFIC PLANS FOR PROVIDING THE PROPOSED SERVICES

**a. List of proposed equipment/goods and approach to providing any service including a proposed work plan.**

McAllister & Quinn would continue to provide Longwood University the following comprehensive services as part of our contract.

Federal Grant and Foundation Prospecting Research

McAllister & Quinn will provide Longwood University with a comprehensive service focused on obtaining federal grants and private foundation funding. The federal grants and foundations team will work closely with the University to support and expand their existing grant and foundation efforts. This typically starts with conducting an organizational analysis that examines the University's key programs, strengths, and goals. We have already done an organizational analysis with Longwood, but propose conducting additional periodic visits to stay abreast of changes on campus. We use the information gleaned in these visits to locate grant and foundation opportunities that are a strong fit for Longwood and put these into a 12 month "opportunity matrix". All potential grant competitions that are placed into this 12 month grant matrix (that is divided into quarters), have been prequalified for eligibility and probability of success. Each client's 12 month grant matrix has approximately 3-5 federal opportunities per quarter. Once this matrix is collaboratively developed, Longwood University would have a focused grant strategy in place for the year. Next, before we assign a McAllister & Quinn writer, we will work with the University to develop a concept paper to be submitted to the agency Program Officer for feedback. And in most cases, we arrange a conference call between the Program Officer and the client's subject matter expert assigned to help with the development of the proposal. At McAllister & Quinn, we consider all of these steps a part of the prospecting process.

Faculty Development through Face-to-Face Meetings with Program Officers and Workshops

The McAllister & Quinn team possesses extensive relationships and personal contacts with Program Officers at all of the federal agencies that fund institutions of higher education. These agencies include the NSF, NEH, NIH, HRSA, and the Departments of Education, Labor, Defense, Commerce, Justice, Transportation, and Energy. Within months of working with us, our clients go from simply reading the agency websites and hoping they understand the specifics of the grant application, to meeting face-to-face with the actual decision makers and being able to hear firsthand how to get funded. We have had great success with Longwood faculty utilizing this process and would continue to do so going forward.

The firm also personally organizes and hosts 3-4 federal agency sponsored workshops per year that Longwood University would be invited to. At these “client only” sessions, Program Officers work one-on-one with faculty to learn how to write a successful grant. The faculty who have participated in these workshops have raved about the quality of the information and useful feedback that they have been able to secure through these day-long events.

#### Grant Writing Services from Network of Professional and Experienced Grant Writers

Longwood University would have access to the McAllister & Quinn grant writing operation and we will write one grant per quarter for the University. The McAllister & Quinn grant writing team is a network of 250 grant writing professionals that are utilized by our clients on a daily basis. These writers are a diverse group of individuals who each have specific areas of expertise. The grant writers’ backgrounds range from accomplished academics to seasoned professionals, all of whom have written successful grants throughout their careers. We have organized and developed this grant writing team with the understanding that all grants are different and that it is essential that we link up the appropriate writers with their areas of expertise.

We have found that being able to provide this grant writing service has had a huge impact on client success and at times changed the overall attitude towards grants on a campus. For most faculty the biggest barrier to getting a grant funded is the actual writing of the grant. In many cases, faculty do not feel that they have the time, the resources, or the grant writing experience to feel confident enough to apply for a federal grant. The McAllister & Quinn process of giving faculty at least 6 months’ notice of a grant opportunity, introducing them to the agency Program Officer, and providing an experienced technical grant writer can and has produced tangible results for our higher education clients. If engaged, we can put this results oriented process in motion for your institution.

#### **b. What, when, and how services will be performed.**

McAllister & Quinn grant will provide Longwood University with all the aforementioned comprehensive grants consulting services, including grant writing services for four (4) grants per year. The work will be directed from the McAllister & Quinn side by Ellen Riddleberger and Annie Kurowski.

#### **c. Timeframe for initial start-up.**

Given that McAllister & Quinn has extensive experience working with Longwood University, we are ready to hit the ground running as soon as a new contract is in place.

## 5. SMALL BUSINESS SUBCONTRACTING PLAN (ATTACHMENT B)

ATTACHMENT B FOLLOWS THIS PAGE

## ATTACHMENT B – SMALL BUSINESS SUBCONTRACTING PLAN

### Definitions

**DSBSD:** Department of Small Business and Supplier Diversity.

**Small Business:** “Small Business” means an independently owned and operated business which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. Note: This shall not exclude DSBSD-certified women- and minority-owned businesses when they have received DSBSD small business certification.

**Women-Owned Business:** Women-owned business means a business concern that is at least 51% owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, and both the management and daily business operations are controlled by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law.

**Minority-Owned Business:** Minority-owned business means a business concern that is at least 51% owned by one or more minority individuals or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.

**All small businesses must be certified by DSBSD by the due date of the solicitation to participate in the SWaM program. Certification applications are available through DSBSD online at [www.dmb.virginia.gov](http://www.dmb.virginia.gov) (Customer Service).**

**Offeror’s Name:** \_\_\_\_\_

**Preparer Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

### Instructions

- A. If you are certified by DSBSD as a small business, complete only Section A of this form. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received DSBSD small business certification.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the offeror to receive credit for the small business subcontracting plan evaluation criteria, the offeror shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business in this section. Points will be assigned based on each offeror’s proposed subcontracting expenditures with DSBSD-certified small businesses for the initial contract period as indicated in Section B in relation to the offeror’s total price.

### Section A

If your firm is certified by DSBSD, are you certified as a (**check only one below**):

_____ Small Business	Certification Number: _____
_____ Small and Women-owned Business	
_____ Small and Minority-owned Business	Certification Date: _____

## Section B

Populate the table below to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.

### Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement

#### ANSWER:

McAllister & Quinn will make an effort to work with disadvantaged business enterprises, including businesses owned by women and minorities, and veterans, as part of this contract. Of the firm's 250 grant writers who are members of our exclusive network, more than half are women and/or-minority owned small businesses. This pool of independent contractors works with McAllister & Quinn clients on a daily basis and will be utilized in providing services Longwood University. Our subject-matter experts are matched to a particular grant project based on the subject at hand (for example, an engineering grant expert would not write nursing grant application). We select our grant writers and reviewers based on what grant programs we are going to pursue for Longwood University; therefore, we cannot guarantee that the certified contractors below are a match for the grants as of yet (we must first conduct our organizational analysis with the University).

These writers/reviewers will be given top consideration and will be thoroughly vetted as potential matches so that we can improve our likelihood that we can engage them on the contract.

Additionally, we wanted to include another contractor (Bethany Piersol and Katherine Johnston, Advancement Ink. Richmond, VA and Blacksburg, VA); however, their certification number #652183 did not appear in the Virginia directory and they may be unaware that their certification expired; therefore, we will not include them in the list below but intend to ask them to renew/resolve that discrepancy and would encourage their participation.

CONTINUED NEXT PAGE

..... Section B Continued....

Small Business Name & Address  DSBSD Certificate #	Status if Small Business is also:  Women (W) Minority (M)	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Involvement During Initial Period of the Contract	Planned Contract Dollars During Initial Period of the Contract
STACY M RUBLE Doing Business As: Stacy Ruble Consulting Services 7421 CHAMBERLAYNE AVENUE RICHMOND, VA 23227  #691547	WS	Contact: STACY M RUBLE Phone: (804)339-2033 STACYRUBLE@YAHOO.COM	91804 Accounting/Auditing/Budgeting Consulting 91806 Administrative Consulting 91875 Management Consulting 91883 Organizational Development Consulting	Grant writing and review	TBD – see next page Range: \$5,000.00 to \$10,000.00
STREAMLINES LLC Doing Business As: StreamLines LLC 5517 SNEAD RD RICHMOND, VA 23224  #712669	WS	Contact: MARTHA J. MEAD Phone: (804)837-7936 Fax: (804)276-0031 MMEAD@STREAMLINESLLC.COM	91800 Consulting and Grant Writing  96198 Program Development and Funding	Grant Writing and Review	TBD – see next page  Range: \$5,000.00 to \$10,000.00
<b>Totals \$</b>					\$10,000.00 to \$20,000.00

## 6. PROPOSED COST.

McAllister & Quinn will provide the aforementioned scope of work for a set monthly retainer of \$8,000.