Cityspan Web-based Proposal Training Manual

School Year 2010-2011

Community & Campus Proposals

Proposal Due Date
Friday, February 26, 2010 5:00 PM
Only completed proposals will be accepted.
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I: INTRODUCTION

Welcome to the After School Matters (ASM) Cityspan Proposal process! In an effort to streamline proposal submission, ASM utilizes a web-based system for proposal submission and evaluation.

This manual provides step-by-step instructions for the on-line proposal process and should be used in conjunction with the Request for Proposals (RFP), which provides more program-based information about completing your proposal. As you complete your proposal online, please direct all technical questions to the Cityspan Help Desk at (866)469-6884. All proposal content questions should be directed to ASM at (312)742-4182. When you call, ask for the Region for which you are applying.

II: GETTING STARTED

System Requirements: Internet Explorer version 6 (or higher) OR Firefox version 3 (or higher). You should also have the latest version of Adobe Reader installed (currently version 9). Note: there are free upgrades to the latest versions of Internet Explorer, Firefox, and Adobe Reader.

Go to: http://www.youthservices.net/asm/registration.asp to create an account.

Note: If you have an ASM RFP account from a previous proposal term (Summer 09, School Year 09, Summer 10), you do not need to go through the registration process. You can go directly to www.youthservices.net/asm and login with your existing account. You will also have access to the proposals that you worked on previously. If you forgot your password, click the “Forgot your password for your RFP account” link.

Account Creation Instructions

To create an account, enter the following information:
- Your Name
- Your Phone Number
- A Username (you can use your email as your username, unless you have another account with the
username set as your email address)
- Your Email
- Create a Password – must be at least 10 characters
- Select “Organization” or “Individual,” based on whether you are submitting a proposal as part of an
organization or independently.
- Your Organization’s Tax ID number
- Your Organization or Fiscal Sponsor

Click “Create Account.” If there were any errors, you will be asked to re-enter information. Otherwise, a message
will display “Successful Registration. Please login now with your e-mail address and password.” Click the login link.

Enter the username and the password that you created.

After you create an account, use the following link to login to the system whenever you need to access your
proposal(s): http://www.youthservices.net/asm/

Helpful Hint: System users will only be able to view proposals that they created. Therefore, if multiple people
from your organization will be working on the same proposal or if you want to view other proposals that have
been created for your organization, you should share the same UserID.

A couple scenarios for setting up user accounts are provided below.

Scenario 1:
ABC Organization has multiple locations and plans to submit proposals for each site. Each site has
designated someone to be responsible for submitting a proposal to After School Matters (ASM). The
different sites do not need to view each other’s proposals.

Solution: Each proposal lead at ABC Organization will create an account, using his/her email and a
password. When the proposal leads at each site create an account, they will use the same Tax ID number.
They will use their own email address and a password. Each proposal lead will create a proposal for their
site and will only be able to see the proposals that they created.

Scenario 2:
XYZ Organization has one site with five team members. The organization plans to submit two proposals.
Each team member will be working on different sections of the proposals.

Solution: The 1st person to create an account for XYZ Organization will enter the Tax ID number and his/her
email address and password. He/she will share this email and password with the team. All team members
will logon to the system with the same email and password so that they can all work on the proposal for XYZ
organization.

Note: Two people should not be working on the same section of a proposal at the same time;
otherwise they may overwrite each other’s work.
You are now ready to begin!

III: DEVELOPING YOUR PROPOSAL

Creating a New Proposal

From the FY10 RFP page, you will see a “new proposal” that you can begin editing. If you need to create an additional proposal, click “Add additional proposal.”

Once you click into the proposal, you will see a screen like the one below. Proposals consist of a set of forms to be completed.

- **Initial** – selection of organization type (for organizations) and proposal type.
- **Program Information** – information on the program, such as the title, classification, and population targeted.
- **Contact Information** - contact information for the organization, instructors, etc.
- **Program Logistics** - details where and when the program will be held.
- **Questions** - information on your organization, a full description of the program, and how youth will get the experiences and skills they need out of your program.
- **Weekly Program Plan** – goals, objectives, and plans for each week of the program.
- **Financial Questions** – financial background on the organization (organizations only) and your budget.

You must complete and submit the first two forms (Initial and Program Information) before moving onto the remaining forms. After you complete and submit Form 2, you can work on the remaining forms in any order.
Form 1: Initial

To start entering information, click “Edit” next to Form 1. Form 1 contains a chart describing the differences between Campus and Community proposals, along with who is eligible to apply. In Form 1, if you are creating a proposal for an organization, you will select the type of organization: non-profit or for-profit. Independent Instructors will not need to complete this question.

You will see the type(s) of proposals that you are eligible to apply for. Community proposals are available for non-profit organizations ONLY. Anyone is eligible to submit a Campus proposal. Select the type of proposal: Community or Campus.
On each form, you will see a red or green header at the top of the screen. This is the indicator whether all required fields are complete. If the header is red, there are still required fields to complete. If the header is green, all required fields are complete. **All required fields will display with a red bar on the left side of the field.** (If you are using Internet Explorer 6.0, drop-down fields will not display the red bar. However, many of these are required, and you will not be able to submit the form until these fields are completed)

You can save a form at anytime, whether all fields are complete or not. You will not be able to submit until all required fields are complete.

⚠️ **Note:** Once you submit a form, you cannot edit the form.

 Helpful Hint: You must complete and submit forms 1 and 2, before moving on to the rest of the forms. Then, you can complete forms 3 – 7 in any order. You do not need to submit forms 3 – 7 until you are ready to submit your complete proposal.

You will see the following buttons in the upper right corner of the form:
- Click **Cancel** to return to the previous screen without saving.
- Click **Save** to save your entries.
- Click **Save & Return** to save your information and return to the previous screen.
- Click **Submit** once you have completed all information on this form. **Once you submit a form, you cannot edit the form.**

After you have made the selections on Form 1, click ”Submit.” A pop-up message will ask if you are sure you want to submit final. Click “OK” (or “Cancel” to return).
Form 2: Program Information

After Form 1 is submitted, you can work on Form 2. You will see a screen like the one below. The status of Form 1 has changed to “Submitted.” Now, click “Edit” next to Form 2: Program Information.

You will need to enter the following data in the Program Information form:

1. **Proposed Program Title** (e.g. Creative Writing)
2. **Program Model** – select from dropdown list (Club, Pre-Apprenticeship, Apprenticeship, Advanced Apprenticeship, NeighborSports). *Note: only Advanced Apprenticeship should be selected if you are submitting a proposal for the Downtown region.*
3. **Half Program** – indicate if you are proposing a half program (refer to the Program Model section of the RFP document for more details).
4. **Program Classification** – select the appropriate classification of your program from the list. Select the Content Area, then Sub-Content Area, then Category. If there is a better description for the classification of your proposed program, you can enter it in the text box provided. However, you still need to select a classification from the pre-defined options.
5. **Populations Targeted** – check all that apply in the high-needs population boxes. This question is not required and is used to indicate that you are specifically targeting this group.
Note: In some cases, you will need to click “Save” for the system to recognize that you have completed required fields and for the red/green message on the top to update. To check if you have completed all required fields, click “Save.” Any required fields that are not complete will display with a red bar to the left of the field.

You will see the following buttons in the upper right corner of the form:
- Click Cancel to return to the previous screen without saving.
- Click Save to save your entries.
- Click Save & Return to save your information and return to the previous screen.
- Click Submit once you have completed all information on this form. Once you submit a form, you cannot edit the form.

After you have completed Form 2, click “Submit.” A pop-up message will ask if you are sure you want to submit final. Click “OK” (or “Cancel” to return).
**Form 3: Contact Information**

After you complete and submit Forms 1 and 2, you can work on the remaining forms in any order. You do not need to submit the remaining forms until you are ready to submit the full proposal. You will also see the status of Forms 1 and 2 is “Submitted.” You can view these forms, but can no longer edit these forms.

Click “Edit” next to Form 3: Contact Information.

You must provide the following contact information:

**Organization Contact (for organizations only)**
- Organization Name
- Organization Address
- Organization Phone Number
- Executive Director Name
- Executive Director Phone Number: at least one of the following (home, work, cell)

**Documents (for organizations only)**
- Certificate of Good Standing for the State of Illinois - If you do not have this letter available, refer to [www.ilsos.gov/corporatellc/index.jsp](http://www.ilsos.gov/corporatellc/index.jsp).
- Proof of 501(c)3 status (non-profit organizations only)

These documents can be uploaded, or check the box to indicate you will mail the document.
The box is checked, indicating that you will mail in the document

⚠️ Note: Do not exit this screen until the window closes and the name of the file displays on the screen to ensure your document has been added to the system. If the name of the file does not appear after the upload window closes, click the Save button on the upper right corner of the form.

After the upload is complete, you will see the name of the file listed. If you want to replace this file, you must first delete the file that is uploaded. Then you can upload a new file.

The following contacts are required for Organizations:

**Contract Administrator**
- Contract Administrator First Name / Last Name
- Contract Administrator Phone Number: at least one of the following (home, work, cell)
- Contract Administrator Email

**Primary Contact**
- Primary Contact First Name / Last Name
- Primary Contact Address: Street, City, State, Zip Code
  - If address is the same as organization address, check the box “Check here if Mailing Address is the same as the organization’s.” Then, you will not have to enter the address again.
- Primary Contact Phone Number: at least one of the following (home, work, cell)
- Primary Contact Email Address
Community Liaisons (Community proposals only)
- Community Liaison First Name / Last Name
- Community Liaison Phone Number: at least one of the following (home, work, cell)
- Community Liaison Email

Instructor 1 & 2
You are responsible for identifying instructors for your program. The quality of the instructor(s) is an important indicator of the quality of a program. Proposals for Clubs, NeighborSports and Half programs are only required to have one instructor; proposals for all other program models must submit information for two instructors.
- Instructor First Name / Last Name
- Instructor Address
- Instructor Phone Number: at least one of the following (home, work, cell)
- Instructor Email
If the instructor is the same as the Community Liaison (Community proposals only), check the box to indicate this.

In addition to contact information, the following background information should be provided for each instructor:
- Profession
- Number of years in profession
- Number of years working with youth
- Highest degree completed
- Number of years working in the program content area field (e.g. Business, Science, etc)
- Other Professional or Youth Development related coursework or enrichment (workshops, professional development, conferences, classes, etc.)
- Certifications/Associations/Awards
- Have you previously worked with After School Matters (ASM)?

Instructor Documents
- Instructor resume – this must be uploaded. Microsoft Word and PDF files are preferred. See the previous page for instructions on uploading a file.
- Instructor work samples – this is optional and may include photographs, papers, portfolios, video, audio, curricula. If included, this must be uploaded. Note the file restrictions below.

Note: Depending on the speed of your internet connection and the size of your files, uploading documents may take a long time. For work sample documents, please follow the guidelines below.
- Pictures: 2-3 pictures maximum / 3 MB per file maximum
- Audio: 1 minute of audio maximum / 1 MB maximum
- Video: The maximum file size is 5 MB.

Helpful Hint: If you do not know your second instructor by the time you submit your proposal, fill in “TBA” for the name, address and email, and “0” for the phone number. However, in “Section 5: Required Documentation,” you should upload a plan and timeline for identifying your second instructor in the “Instructor 2 Resume” field.

You can save and return to this form at any time. After you enter all required fields, you may submit the form. However, you cannot edit the form after it is submitted.

Note: In some cases, you will need to click “Save” for the system to recognize that you have completed required fields and for the red/green message on the top to update. To check if you have completed all required fields, click “Save.” Any required fields that are not complete will display with a red line.
You will see the following buttons in the upper right corner of the form:

- Click **Cancel** to return to the previous screen without saving.
- Click **Save** to save your entries.
- Click **Save & Return** to save your information and return to the previous screen.
- Click **Submit** once you have completed all information on this form. **Once you submit a form, you cannot edit the form.**

**Form 4: Program Logistics**

Click edit next to Form 4: Program Logistics to enter information in this form. This form is different for Community and Campus proposals.

**Campus Proposals:**

For Campus proposals, you will need to enter the following information:

- Which ASM Region is your first preference to run your proposed program?
- What other ASM Regions are you willing to run your proposed program in (select all that apply)?
- What days / times are you available to run your proposed program? **Note: Specific schedules will be determined in collaboration with the school.**
- What space and amenities are needed to run the program? After you complete this question, you will be able to Submit this form.
Community Proposals:
You will enter information about your program site(s) and schedule. If there are multiple locations, please make it clear what days and times you will be at which location. **It is strongly encouraged that you get in writing each site’s agreement to allow you to use their space if awarded a contract.**

You need to provide the following information for each site:

- Site Name
- Address
- Phone
- Room
- Community Area (click map to determine Community Area)
- **ASM Region** (click map to determine **ASM Region**)
- Days and Times of Programs – use the drop down boxes to enter the times for the days that your program will be held.
- Describe the space and amenities intended for use by the program.

**Helpful Hint:** If your program site is the same as the organization address that you entered in Form 3, check the box next to “Check here if Program Site address is the same as the Organization’s address.” Then, you will not need to enter the address again.
You can save and return to this form at any time. After you enter all required fields, you may submit the form. **However, you cannot edit the form after it is submitted.**

⚠️ **Note:** In some cases, you will need to click “Save” for the system to recognize that you have completed required fields and for the red/green message on the top to update. To check if you have completed all required fields, click “Save.” Any required fields that are not complete will display with a red line.

You will see the following buttons in the upper right corner of the form:
- Click **Cancel** to return to the previous screen without saving.
- Click **Save** to save your entries.
- Click **Save & Return** to save your information and return to the previous screen.
- Click **Submit** once you have completed all information on this form. **Once you submit a form, you cannot edit the form.**

**Form 5: Questions**

Click “Edit” next to Form 5: Questions Form.

This form, along with the Weekly Program Plan, will most likely take the most time and effort to complete. Successful applicants are thorough and specific in this section, especially in regards to the high-level of youth participation that we require.

This form is divided into four main parts:
- Program Overview
- Impact
- Implementation
- Logistics

⚠️ **Note:** Be sure you save your work frequently. You may consider developing your answers to your questions in a Word document so you can copy and paste your answers in the text boxes.

**Helpful Hint:** The system does not have a spell check function. This is another reason we suggest that you create a Word document to develop your answers to the questions. Then, you can copy and paste your answers in the text boxes.
You can save and return to this form at any time. After you enter all required fields, you may submit the form. **However, you cannot edit the form after it is submitted.**

**Note:** In some cases, you will need to click “Save” for the system to recognize that you have completed required fields and for the red/green message on the top to update. To “check” if you have completed all required fields, click “Save.” Any required fields that are not complete will display with a red line.

You will see the following buttons in the upper right corner of the form:
- Click **Cancel** to return to the previous screen without saving.
- Click **Save** to save your entries.
- Click **Save & Return** to save your information and return to the previous screen.
- Click **Submit** once you have completed all information on this form. **Once you submit a form, you cannot edit the form.**

**Form 6: Weekly Program Plan**

Click “Edit” next to Form 6: Weekly Program Plan

The Weekly Program Plan is one of the most important parts of this application, as it allows After School Matters (ASM) to evaluate your detailed strategy for ensuring the youth get the experiences and skills they need out of your proposed program. This is your chance to show ASM what a ‘day in the life’ of your program is like.

The Weekly Program Plan is not required for Clubs and NeighborSports proposals. Simply click the Submit button on this form for a Club or NeighborSports proposal.
Your plan should articulate the following:

- Clear weekly objectives that meet the program goal
- Activities that support the objectives
- Progressive content skill development
- Teen leadership opportunities
- Strategies to foster inclusiveness and team building
- Reflection activities
- Job readiness skills

In the system, text boxes are provided for you to enter the following information for each week of your program:

- Objective of the Week
- Key activities and corresponding skills to be developed
- Opportunities for teen leadership/reflection/small group work
- Are there any specific events/guest speakers/field trips/community service this week?
You will see partial detail provided for the first week and last week in your Weekly Program Plan for the question: Are there any specific events/guest speakers/field trips/community service this week? These are required components for all programs.

You can save and return to this form at any time. After you enter all required fields, you may submit the form. **However, you cannot edit the form after it is submitted.**

⚠ **Note:** In some cases, you will need to click “Save” for the system to recognize that you have completed required fields and for the red/green message on the top to update. To check if you have completed all required fields, click “Save.” Any required fields that are not complete will display with a red line.

You will see the following buttons in the upper right corner of the form:
- Click **Cancel** to return to the previous screen without saving.
- Click **Save** to save your entries.
- Click **Save & Return** to save your information and return to the previous screen.
- Click **Submit** once you have completed all information on this form. **Once you submit a form, you cannot edit the form.**

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**Form 7: Financial Questions**

Click “Edit” next to Form 7: Financial Questions. Organizations are asked to provide financial background on their organization. Organizations and Independent Instructors will need to complete a budget.

**Financial background (Organizations only):**
- When is your fiscal year end date?
- Are your financial records audited annually by an independent Certified Public Accountant (CPA)?
- What year were you incorporated?
- The following information for the last two fiscal years (FY):
  - Total revenue
  - Revenue from ASM
  - Working Capital
  - Current Assets
  - Current Liabilities
  - Net Income – you must click “Save” to calculate Net Income
  - Amount of Debt at Year End
- Do you receive federal funding? If yes, what is the name of the federal program?

**Budget (Organizations and Independent Instructors):**
- Budget file – you must first download the budget template, complete your budget in the excel file, and then upload the completed budget. See detailed instructions on the following page.
- Enter the total from the summary page of your budget.
Below are instructions for the Budget Form.

**Budget Form**

You must submit this form online.

1. Download the template by right-clicking on the link “Right click here” and save this file to your computer.
2. Enter your data into the budget template and save the file.
3. Click “Upload file.” Click “Browse” on the pop-up window and select the file from your computer.
4. Click “Upload” to add the file to the system. The pop-up window will stay open until your file is uploaded.

**Note:** Do not exit this screen until the window closes and the name of the file displays on the screen to ensure your document has been added to the system.
You also may be asked to upload or mail in:

- Annual Financial Statements from last year, 2 years ago, or both. If your statements are audited, send in the audited version of your financial statements.

Depending on how you answered the financial questions, these will display at the end of the Financial Form, if required. Follow the same instructions as described earlier to upload a document, or check the box to indicate that you will mail in the document.

You can save and return to this form at any time. After you enter all required fields, you may submit the form. **However, you cannot edit the form after it is submitted.**
Note: In some cases, you will need to click “Save” for the system to recognize that you have completed required fields and for the red/green message on the top to update. To check if you have completed all required fields, click “Save.” Any required fields that are not complete will display with a red line.

You will see the following buttons in the upper right corner of the form:
- Click Cancel to return to the previous screen without saving.
- Click Save to save your entries.
- Click Save & Return to save your information and return to the previous screen.
- Click Submit once you have completed all information on this form. **Once you submit a form, you cannot edit the form.**

**Submit Proposal**

Your proposal is complete once all individual forms are submitted and all required documents are mailed to **After School Matters (ASM).** As stated earlier, you must complete and submit Forms 1 and 2 before moving to the rest of the forms. However, you can wait to submit the remaining forms until you are certain everything is complete and accurate.

All forms must be submitted by Feb 26, 2010 at 5:00 PM in order to be considered. After you submit all forms, you will see a screen like the one below. The status is updated and marked Complete, or Complete once ASM receives all required documents.

**Note:** You CANNOT edit forms once they are submitted!
**Mailing Documents**
If you opted to mail-in any of the required documents, they will be listed here. Your proposal is not considered complete until you mail-in these required documents. These documents should be submitted together via mail using the printable confirmation page as the cover page. **These are due into the After School Matters (ASM) offices by March 2 at 5:00 PM.** Note: this is the day after the online submission deadline.

**Confirmation Page**
You will also see a link to view and print a confirmation page. You should print a copy for your records. Also print a copy to use as the cover page for any documents that you are mailing to ASM. Select File → Print from your browser menu.

**Print Proposal**
You can generate a PDF version of your proposal to view and or print. Click the link, “Click here for a printable copy (PDF) of your application.” A new window will open with the full proposal. To print this document, select File → Print from your browser menu.

You can access the links to your proposal and confirmation page at any time.
IV: NAVIGATING THE PROPOSAL SYSTEM

Login
Go to: http://www.youthservices.net/asm/. To login, enter your username (email) and password.

Home Page
When you login to the proposal system, you will see a screen like the one below. This is a listing of all the proposals that you are working on or have submitted. (Note: before you create any proposals, you will see one “new proposal” in the listing.

From this page, you can either: 1) Create a new proposal, 2) Edit an existing proposal, 3) View/ print a submitted proposal.

Helpful Hint: To get back to the home page from anywhere in the system, click “FY10” in the upper left side of the screen.
**Viewing Previous Proposals**

If you are using an account from a prior proposal submission period (Summer 09, School Year 09-10, Summer 10), you can view proposals that you previously created.

For example:

If you want to view a proposal you worked on for last School Year:
1. Keep the first drop-down set to School Year RFP.
2. Change the second drop-down to FY09 School Year.

If you want to view a proposal you worked on for Summer:
1. Change the first drop-down to Summer RFP.
2. Change second drop-down to FY09 or FY10 Summer.
V. Cloning a Proposal (Organizations only)

Organizations that are planning to submit multiple proposals have the ability to clone a proposal that is already created. Cloning a proposal creates a copy of the proposal and will enable you to efficiently create a new proposal that is similar to the original proposal. You can make modifications, as necessary, to the cloned proposal. You can clone both Submitted and Not Submitted proposals.

Common uses for cloning are:
- You plan on submitting a proposal for multiple ASM Regions.
- You plan on submitting multiple proposals with different models (apprenticeship, internship).

⚠️ Note: You will NOT be able to clone a proposal from a previous term.

To clone a proposal, click the “Clone” button next to the proposal that you want to clone. A new proposal named “Clone: Proposal Name” will be created at the bottom of your list of proposals. To work on this proposal, click the name of the proposal. Then, complete the forms of the proposal as you normally would.

Notes on Cloning Proposals:
- Whether the original proposal was Submitted or Not Submitted, the cloned proposal will be Not Submitted. As with any new proposal, you will need to complete Forms 1 and 2 first.
- You can make changes to the proposal type (for example: Community to Campus), model (for example: apprenticeship to club), etc. If you do make a change like this, you may see some fields in your cloned proposal that are blank and need to be completed because they are different for the new proposal type or model that you selected. For example: if you change a Community Apprenticeship to a Community Club, you will need to complete additional questions on Form 5 because these are different from the questions for an Apprenticeship.
- You will need to upload documents again in your cloned proposal (for example: resumes, 501(c)3 status, budget). Make sure that you are uploading the correct Instructor resume if you changed the Instructor and have made appropriate modifications to your budget.
VI. Frequently Asked Questions

1. Who do I call for help?
For system related issues or questions, contact the Cityspan Help Desk.

   Cityspan helpdesk contact info:
   Monday through Friday
   8 am - 5 pm Pacific Time (10 am - 7 pm Central Time)
   Phone: 866-469-6884
   Or: http://www.youthservices.net/helpdesk.asp

All proposal content questions should be directed to ASM at (312)742-4182. When you call, ask for the Region for which you are applying.

2. What is Cityspan?
Cityspan is a software development firm providing web-based client participant tracking and management solutions to public agencies, nonprofit organizations and foundations.

3. Will the information we enter be secure?
Yes, your information will be secure. Each organization will have a login and password that will limit their access to the system to see only their organization’s data. After School Matters (ASM) / Department of Children and Youth Services and Cityspan will have access to view all agencies data to help support/trouble shoot issues. Cityspan has signed a confidentiality agreement and will not share/show the data to any third party.

4. Do I need to resubmit documentation if I have worked with ASM before (e.g. resume, 501 (C) 3)?
Yes.

5. Do I still need to mail in full proposal copies?
No. You do not need to mail in a separate proposal. ASM will receive and evaluate your proposal through the web-based system.

6. The training manual references documents that can be mailed in. What documents can I mail in?
The following documents may be mailed in if they do not meet the restrictions of size and file format, or cannot be uploaded for another reason:
   - Certificate of Good Standing for the State of Illinois
   - Proof of 501 (C) 3 Status
   - Most Recently Audited Financials

7. What is the deadline for mailing in these documents?
The deadline is March 2 at 5:00 PM. This means these documents must be received (not postmarked) at the ASM office by 5:00 pm on March 2.

8. What if I do not know who will be my second instructor?
If you do not know your second instructor by the time you submit your proposal, fill in “TBA” for the name, address and email, and “0” for the phone number. However, in “Section 5: Required Documentation,” you should upload a plan and timeline for identifying your second instructor in the Instructor 2 Resume field.