

COMPLETING AN ANNUAL AGENCY THRESHOLD APPLICATION

PARTNERGRANTS TRAINING

PURPOSE

The purpose of this guidance is to assist non-profit organizations through the annual Agency Threshold Application process, which takes place in the PartnerGrants grants management database system.

In order to be considered for APH funds – either through a direct award or a competitive process – is establishing an agency’s capacity to enter into a contract with Austin Public Health and the City of Austin.

If an organization demonstrates that essential non-profit organization standards are met through submission and approval of the Annual Agency Threshold Application, the agency will be notified by email.

If and when a competitive solicitation (Request for Proposals) becomes open that the agency wishes to apply for, the organization is directed to return to the PartnerGrants system to complete the Intent to Apply and the RFP process. Should this occur, please review the instructions on **Completing the RFP Proposal Guide**.

REGISTERING AS A VENDOR

All non-profit agencies need to be registered as a potential vendor with the City of Austin. The first step is to create a vendor account through the [City of Austin’s Financial Online](https://www.austintexas.gov/financeonline/finance/) system:
<https://www.austintexas.gov/financeonline/finance/>

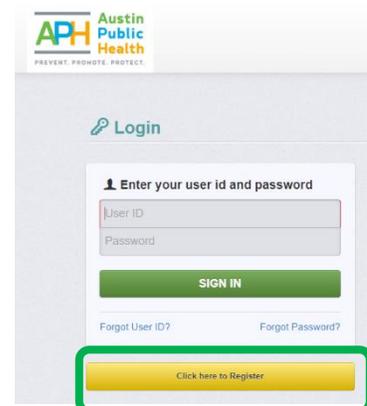
If you run into any challenges while completing the registration information, you can contact the City’s Vendor Registration office at (512) 974-2018 for assistance. Once the process has been completed, please make note of your organization’s assigned vendor code, which is required to register in PartnerGrants.

If you are unsure if your agency is already a registered vendor, you can search for the agency’s legal name or Doing Business As (DBA) through the [Registered Vendor Search](http://www.austintexas.gov/service/registered-vendor-search) website: <http://www.austintexas.gov/service/registered-vendor-search>

REGISTER IN THE PARTNERGRANTS GRANTS MANAGEMENT DATABASE

Log-in to the [PartnerGrants system website](https://PartnerGrants.austintexas.gov/index.do):
<https://PartnerGrants.austintexas.gov/index.do>

If you have not already registered in PartnerGrants, select the option to Click Here to Register and complete the required steps.



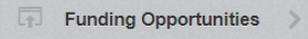
There is no limit on the number of agency staff that may be registered in PartnerGrants.

Registration is typically approved within 2 business days.

COMPLETING THE ANNUAL AGENCY THRESHOLD APPLICATION

IMPORTANT: THIS STEP MUST BE COMPLETED PRIOR TO EITHER RECEIVING A DIRECT AWARD OR APPLYING FOR ANY APH-FUNDED SOLICITATION. IT MUST BE RENEWED EVERY 12-MONTHS.

Once logged-in, from the Dashboard Menu, select **Funding Opportunities**



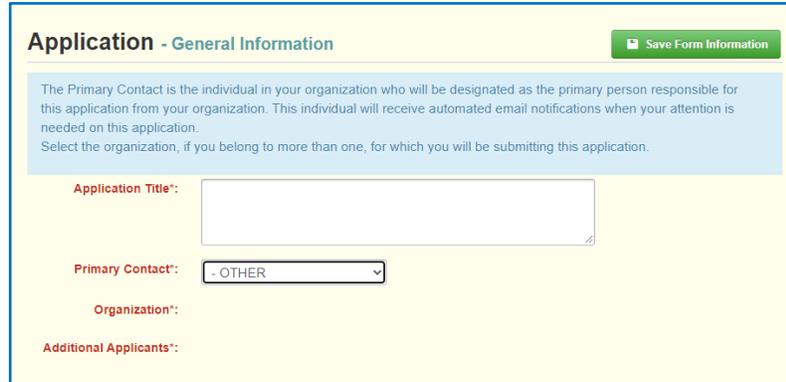
to bring up a listing of all available funding opportunities. From this listing, select the Opportunity Title Annual Agency Threshold Application – [Applicants for Funding Start Here](#).

Once you have selected the Opportunity, select **Start New Application**

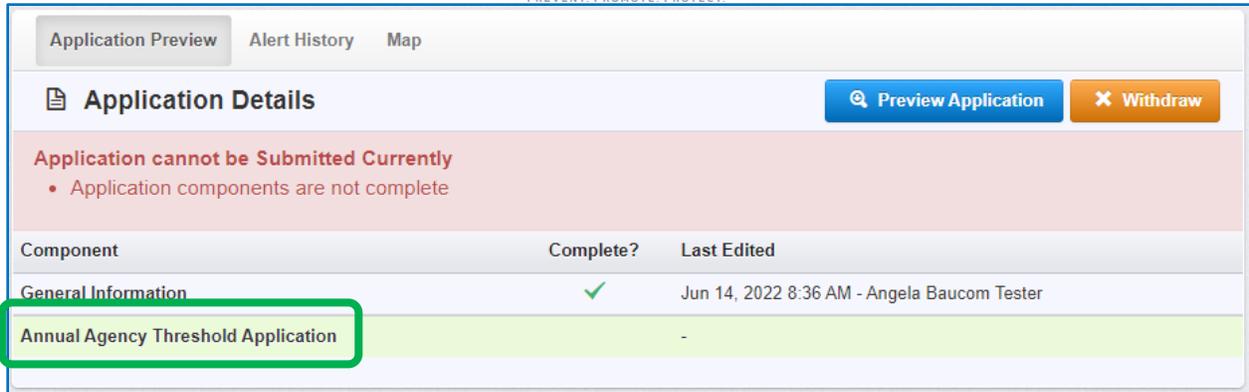


and complete the General Information form according to all posted instructions. Please title your Application “[Your Organization’s Name] – Agency Threshold Checklist – [Primary Contact’s Initials]”.

Click **Save Form Information** after each item to advance to the next field. In Additional Applicants, be sure to include additional Agency users who will need access to the Application or Proposal throughout the process.



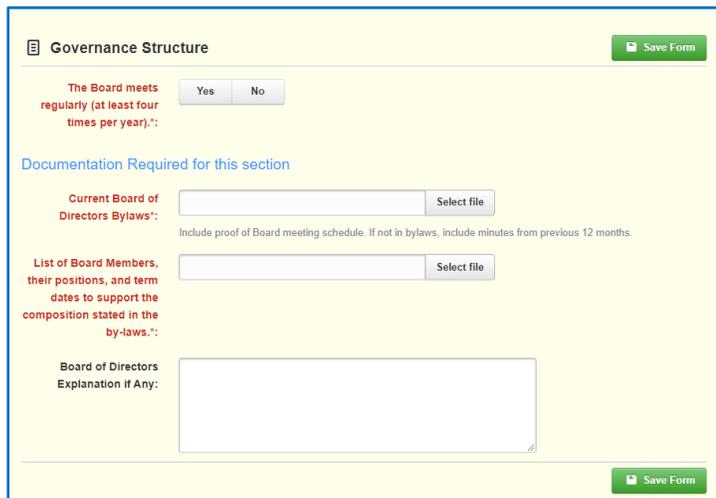
Once complete, click Save Form Information and, from the Application Details page, click **Annual Agency Threshold Application**.



The first section to complete is the Governance Structure. All information should be completed, and the required documents uploaded via the Select File buttons.

Tips:

- Note that the application asks for confirmation of your Board meeting schedule. If your Bylaws do not already include guidelines about the Board meeting schedule, please include minutes from Board meetings in the previous 12 months to support your response to these questions, or include an explanation in the field provided.
- Ensure that the list of board members includes all required information, including the term dates of each member.



Once all Governance Structure information and required documents have been uploaded, scroll down to the Agency Administration section and complete the required information – including uploading the required documents again using the Select File buttons.

Tips:

When uploading documents, title files using only letters and numbers to avoid uploading errors.

Correct: BoardBylaws2022.pdf

Incorrect: Board&Bylaws(2022).pdf

The final portion is the Agency Certification form. Carefully read through the options and select the appropriate answers, use the Select File buttons to upload relevant supporting documentation. When

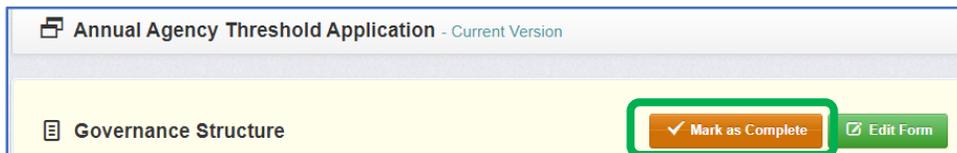
complete, scroll to the top of the screen and select the Save option, and then select **Mark as Complete** to return to the Application Forms window.

Tips:

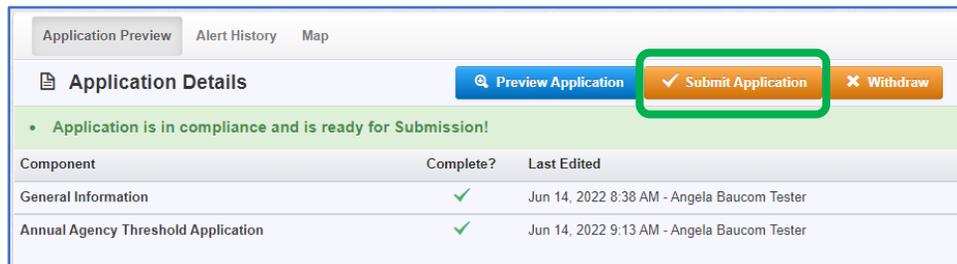
Note that the final item concerning Monitoring Reports is asking about performance and/or operations monitoring and does not refer to financial reviews or audits.

- If your Agency has received any monitoring reports reviewing program and/or operations performance reviews from a funder (including City of Austin):
 - If no findings or issues were reported and everything was satisfactory, answer “Yes” and use the Select File button to include any summary letters or reports that document the results of the monitoring report(s).
 - If any findings or issues were reported, answer “No” and use the Select File button to include any summary letters or reports that document the finding(s) or issue(s). Please also include in the Explanation field a summary of corrective actions taken.
- If your Agency has NOT received any monitoring reports reviewing program and/or operations performance reviews from a funder (including City of Austin), answer “No” and include a statement to that effect in the Explanation field.

Click Save Form at the top or bottom of the form, and click Mark as Complete when all fields and files are correct.



Once both sections have been marked as complete, click Submit Application to submit.



If you have a question, please email APHCompetitions@austintexas.gov with the subject line “Annual Agency Threshold Application – [Agency Name]”.

Only one Annual Agency Threshold Application is required per agency per 12 months. If approved, the Agency will receive notice via email.

NEXT STEPS

Depending on the number of applications being processed, it may take up to 7 business days for Austin Public Health staff to process an Annual Agency Treshold Application. Once processed, agencies will be notified by email of approval or if further clarification is needed. If approved, the submission date of the Annual Agency Threshold can then be used in submitting multiple Intents to Apply across any open APH



Social Services Funding Opportunities unless otherwise specified by the Opportunity exhibits. Please retain a record of approval that can be accessed by anyone associated with your Agency who will be submitting Applications and/or Proposals.

Important:

- Only one Annual Agency Threshold Application is required per agency per 12 months.
- An approved Annual Agency Threshold Application is valid for applying to any Austin Public Health Social Services Funding Opportunity that closes within that time period.
- The month and date of submission should be recorded and used in completing any Intent to Apply forms for solicitation Funding Opportunities.
- **Note:** If an agency is interested in applying for an open RFP, the Annual Agency Threshold Application may be pending at the time the Intent to Apply is submitted, but the Intent to Apply will not be approved until the Annual Agency Threshold Application is approved and the submission date validated by the Opportunity Program Officer.