B2GNOW Software for Government

Staff User Manual

Chapter 5 – Outreach

Published in the United States by B2Gnow/AskReply, Inc.
www.B2Gnow.com

Printed in the United States of America
Third Edition

Chapter 5 – Outreach

Communications between the organization and its vendors is critical to the success of your program. The Outreach module includes multiple components to support the creation of content, publication and management of events, and tracking of notice distribution and event attendance. Components include:

- **Outreach Management** – rapid distribution of information to many contacts
- **Vendor List** – creation and management of vendor lists for specific activities
- **Event Management** – hosting of onsite or online events and attendee registration

The Power of Outreach Management

Your organization is having an event to target a specific group of vendors, such as certified WBEs or DBEs in your area. How do you get the message to them? How do you compose your mailing list? How many hours do you take to compose, create a mail merge, print, collate, stuff envelopes, and mail your announcement?

With the Outreach Module, you can create an Outreach Campaign in minutes, drastically cutting the time required to manage the process.

Examples	Features
• Seminars • Bid solicitations • Classes/training sessions • Conferences • General announcements • Open houses • Certification outreach • Announcement regarding a contract • News and updates	• Comprehensive vendor search • Control visible information • Send reminders • Post notice to Bulletin Board • Revise and add to a notice instantly • No mail merge, printing, or postage • Easily add/edit vendors on the list

Creating and editing outreach campaigns

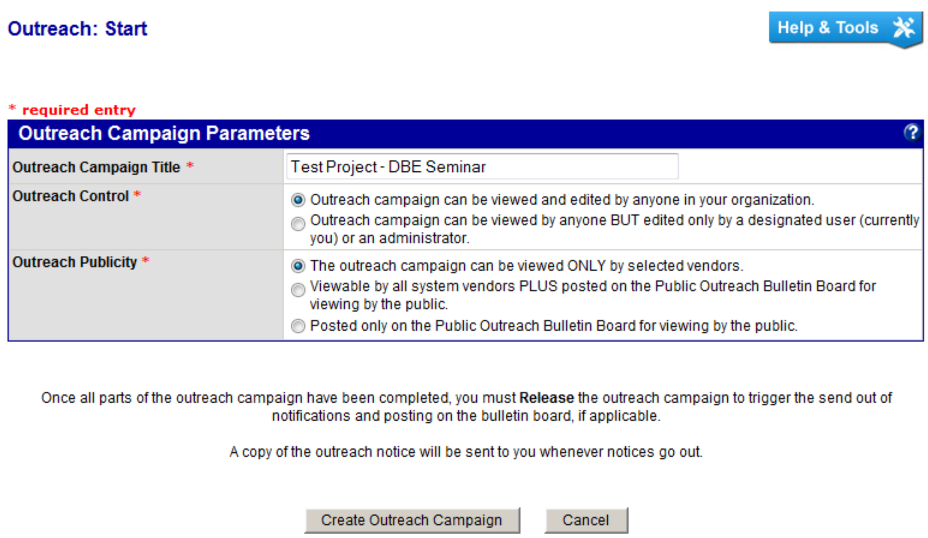
The Outreach module lets you easily communicate with your vendors. You specify all the details for your campaign, such as the campaign message, the frequency with which your vendors receive campaign notifications, and the vendors to which you want to send the campaign notifications.

Creating outreach campaigns

To begin creating the campaign, you specify basic information, such as the campaign title and who can view and edit it. However, the campaign is incomplete until you edit the campaign settings.

To create an outreach campaign

1. From the navigation menu, click **Create**.
2. Click **New Outreach**.
3. In the **Outreach Campaign Parameters** box, select your options.

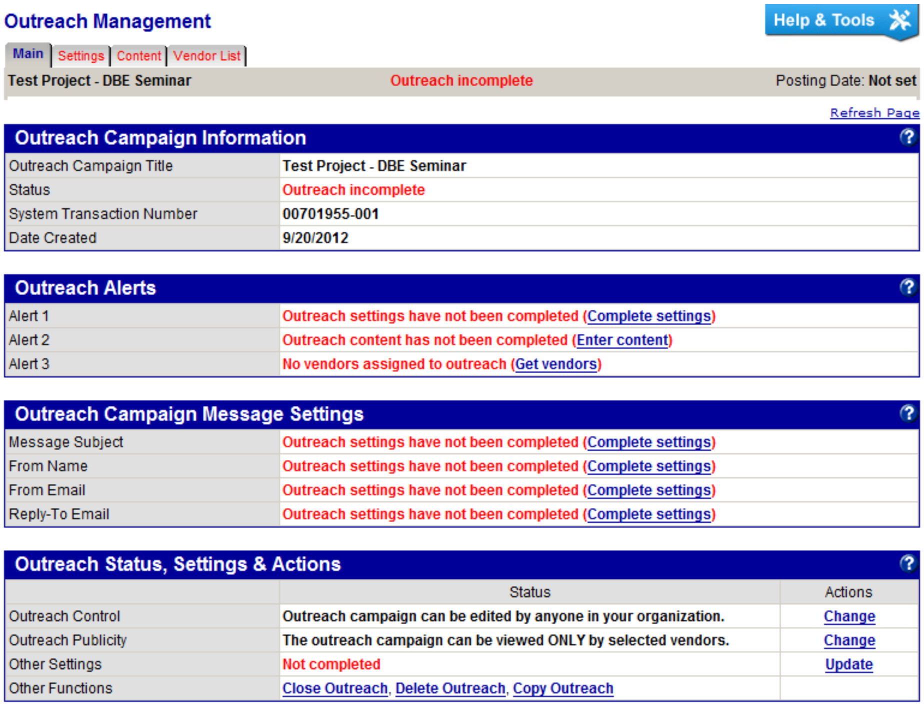


4. Click **Create Outreach Campaign**.

NOTE: Some options may be different based on your organization's configuration.

Editing outreach campaigns

Once you create the campaign and specify the basic information, the Outreach Management page displays. Red text indicates an action needs to be taken. You can specify information such as assigning outreach ownership, notification methods, and delivery dates. Use the hyperlinks and tabs to access the areas for which you need to complete campaign information.


Outreach Management

Help & Tools

Main | Settings | Content | Vendor List

Test Project - DBE Seminar — Outreach incomplete — Posting Date: Not set

Refresh Page

Outreach Campaign Information	
Outreach Campaign Title	Test Project - DBE Seminar
Status	Outreach incomplete
System Transaction Number	00701955-001
Date Created	9/20/2012

Outreach Alerts	
Alert 1	Outreach settings have not been completed (Complete settings)
Alert 2	Outreach content has not been completed (Enter content)
Alert 3	No vendors assigned to outreach (Get vendors)

Outreach Campaign Message Settings	
Message Subject	Outreach settings have not been completed (Complete settings)
From Name	Outreach settings have not been completed (Complete settings)
From Email	Outreach settings have not been completed (Complete settings)
Reply-To Email	Outreach settings have not been completed (Complete settings)

Outreach Status, Settings & Actions	Status	Actions
Outreach Control	Outreach campaign can be edited by anyone in your organization.	Change
Outreach Publicity	The outreach campaign can be viewed ONLY by selected vendors.	Change
Other Settings	Not completed	Update
Other Functions	Close Outreach, Delete Outreach, Copy Outreach	

Main tab. Displays the current status for each area of the campaign, and lets you quickly access sections.

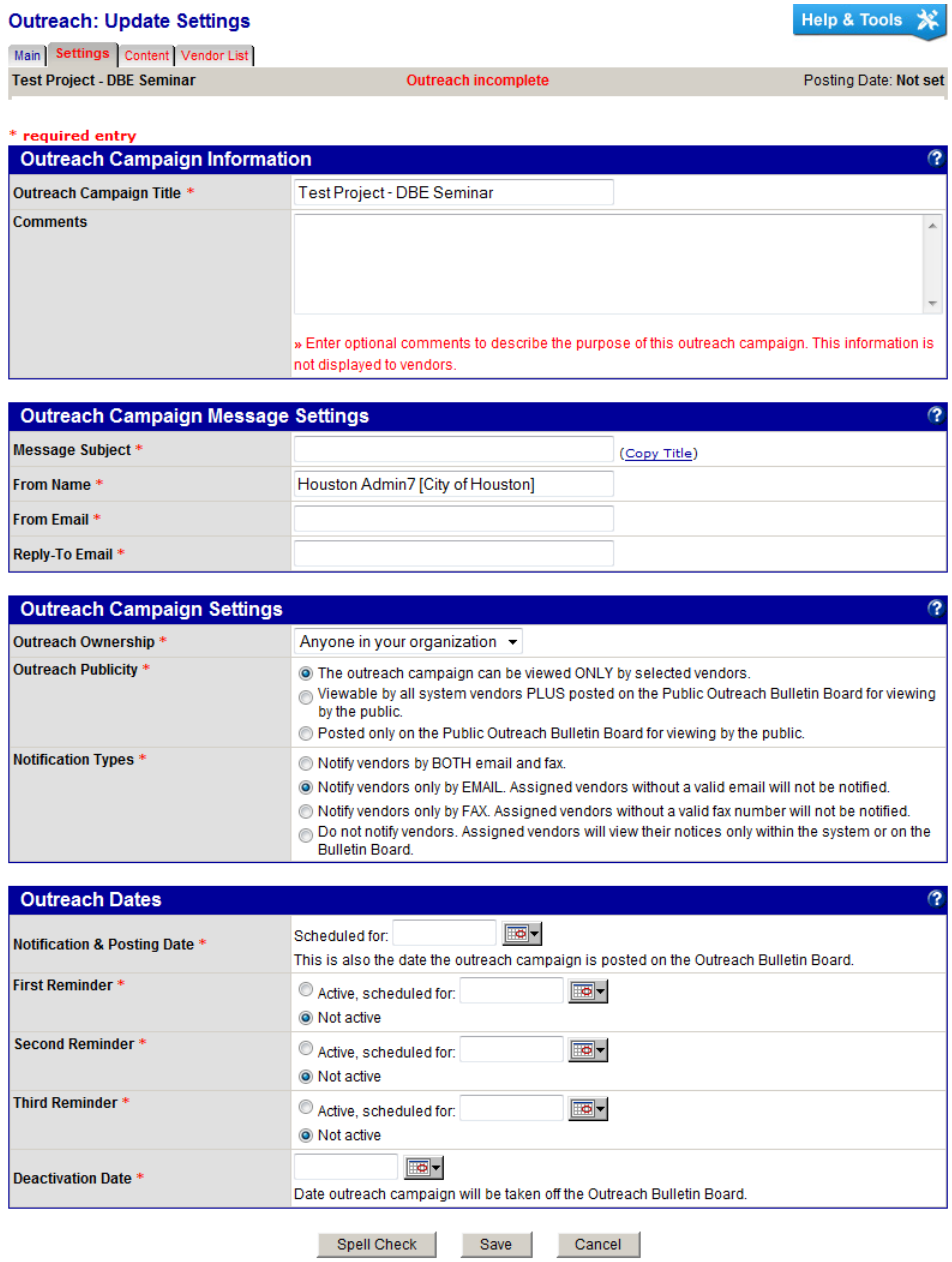
Settings tab. Displays the current information associated with the campaign settings. Enter, edit, or select settings for the campaign information; the campaign message, such as the message subject and the email address you want to use; the campaign settings, such as who can view the campaign information and how vendors will receive the message; and the dates on which the message and reminders, if any, will be sent.

Content tab. Lets you enter and edit the campaign content and view it as vendors will view it, as HTML formatted content or text content.

Vendor List tab. Lets you build and view your vendor list. You begin by entering the search parameters and then add vendors to your list.

To edit campaign settings

1. Go to the **Settings** tab.
2. In the **Outreach Campaign Information** area, edit or enter campaign details.



3. In the **Outreach Campaign Message Settings** area, enter or edit the subject and email details.

NOTE: The message title is the email subject the recipient sees. The outreach title is the label displayed to the user when searching for campaigns.

---

4. In the **Outreach Campaign Settings** area, specify your options.
   Outreach Ownership. The campaign owner.
   Outreach Publicity. Viewing options for vendors.
   Notification Types. The way in which you want vendors to receive notifications. Email sends the notice to the recipient email address, as listed in the system. Fax sends the notice to the vendor's fax number, as listed in the system. Bulletin Board lets vendors view the notification when they are logged in to the system.

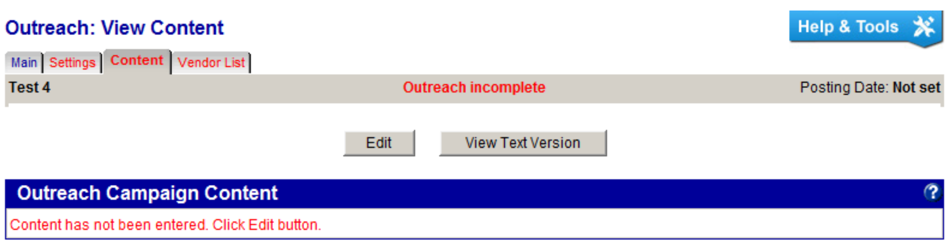
NOTE: Fax notices require the activation of the fax service. The Bulletin Board option can be limited to only firms on your project or open to any vendor in the system to view. Your agency may also have a public Bulletin Board for anyone to view the outreach campaign without logging in.

---

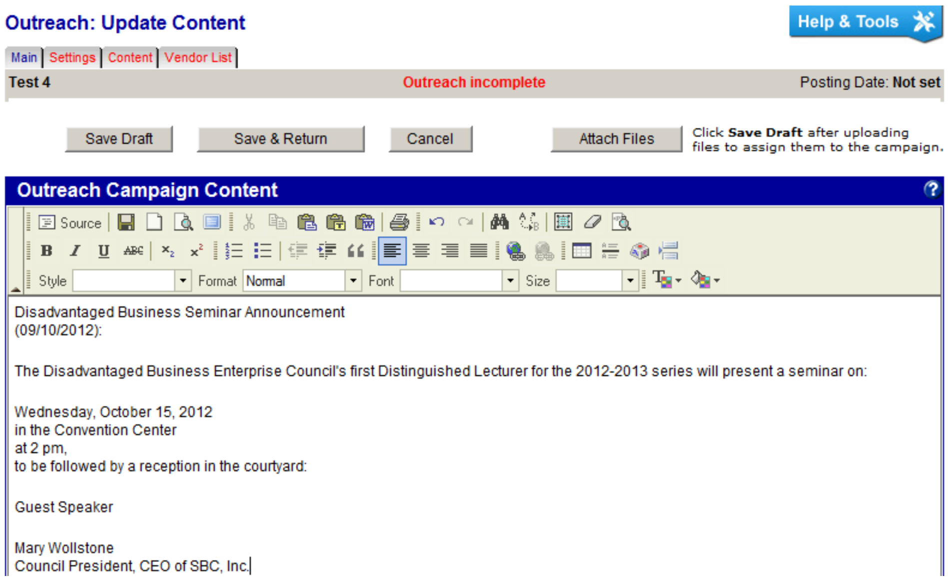
5. In the **Outreach Dates** area, schedule the dates and times on which to send the notification and each reminder, if any. You can send up to three reminders. Each reminder contains the same content as the original message.
6. Click **Save**, and then click **OK**.

To enter campaign content

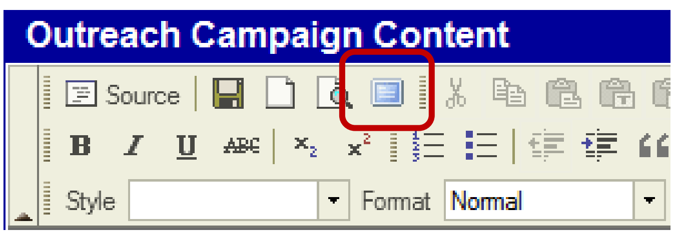
1. Go to the **Content** tab.
2. Click the **Edit** button.



3. In the **Outreach Campaign Content** area, enter the notification content or paste content from an external editor, such as Microsoft Word. For suggestions on composing messages, see **Composing your message** later in this chapter.

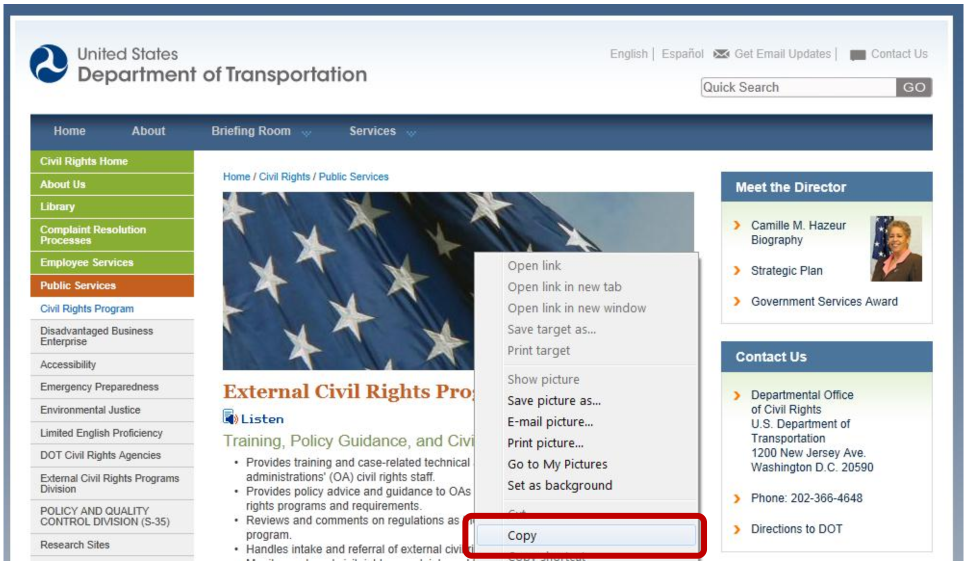


TIP: To maximize the size of the edit box, click the Maximize the Edit Size icon in the top line of the editor menu.

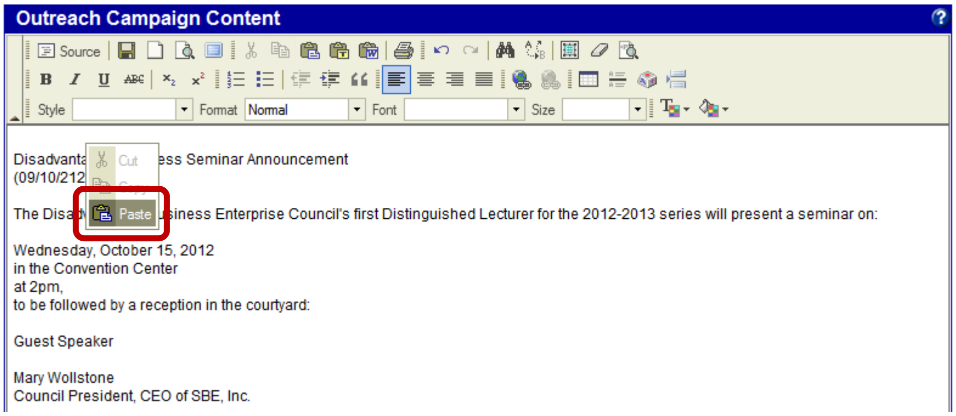


4. To insert an image, first access the webpage that contains the image. The image must be publicly accessible on the Internet.

5. Right click on the image and select **Copy** if using Internet Explorer. The copy option may be labeled differently in other browsers.

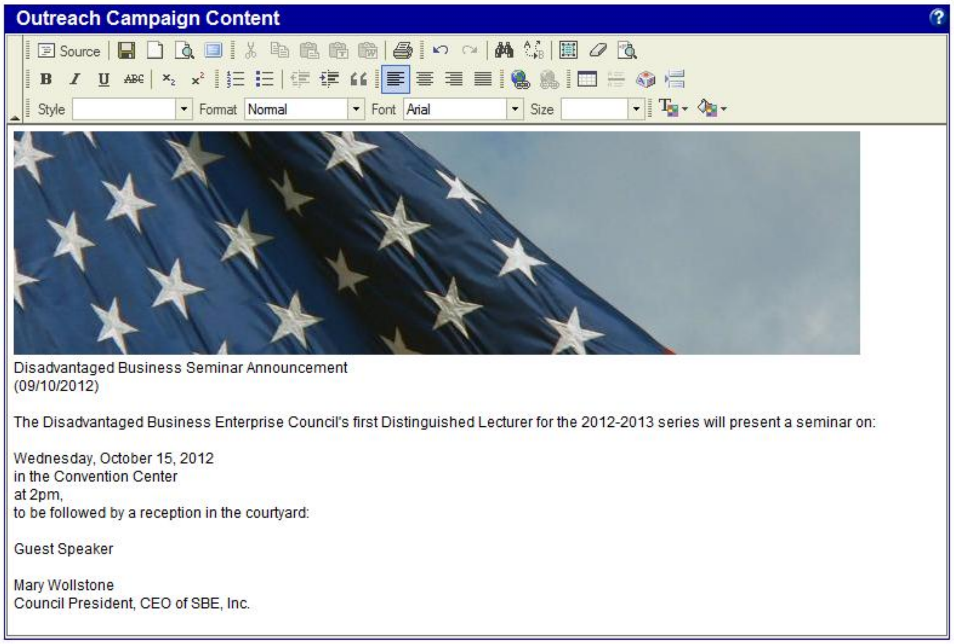


6. Return to the edit box in the system and click where the image is to be inserted.
7. Right click and select **Paste**.

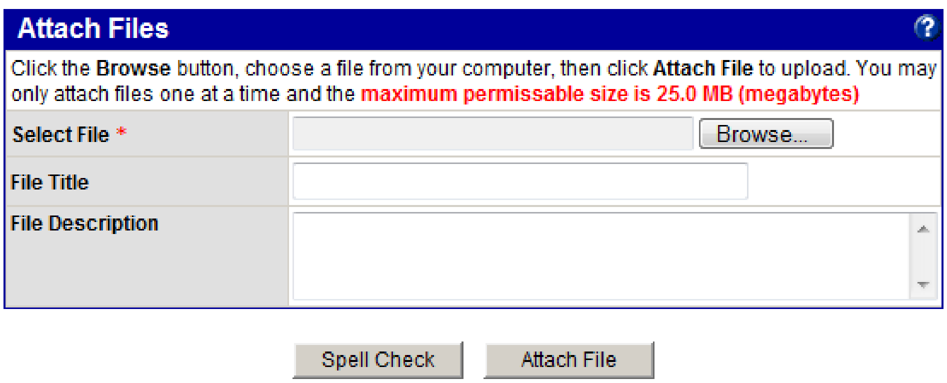


8. Click **Allow access** on any popup warnings.

9. The image will appear.



10. To attach files, click the **Attach Files** button. A popup window will display.
11. In the **Select File** area, click the **Browse** button and locate and select the file.



12. In the **File Title** and **File Description** fields, enter the title and description of the file.

13. Click **Attach File**.
    To include an additional file, click **Attach Another File** and repeat the process. You can attach as many files as needed.

File Details

The following file was successfully uploaded. Click **Return to List** to upload more files or manage the uploaded files.

File Title	**Summary_info.txt**
Filename	**Summary_info.txt**
File Size	**N/A**
File Description	**N/A**

Attach Another File | Return to List | Close Window

14. To close the window, click **Close Window**.
15. Click **Save & Return**.

An HTML formatted preview of your message displays on the page. From here, you can edit the content or view the text version.

Outreach: View Content Help & Tools

Main | Settings | Content | Vendor List

Test 4	**Outreach incomplete**	Posting Date: **Not set**

Edit | View Text Version

Outreach Campaign Content

Disadvantaged Business Seminar Announcement
(09/10/2012)

The Disadvantaged Business Enterprise Council's first Distinguished Lecturer for the 2012-2013 series will present a seminar on:

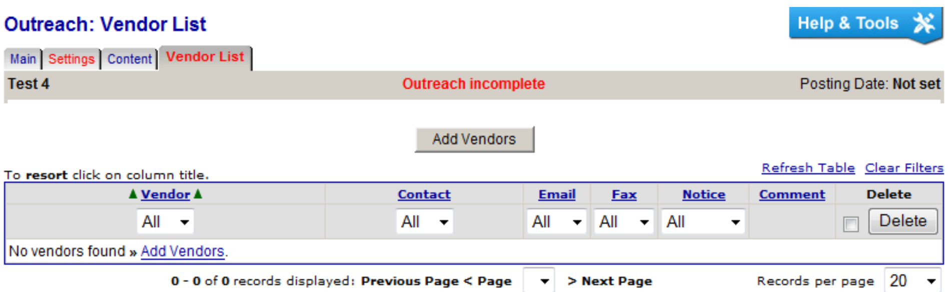
Wednesday, October 15, 2012
in the Convention Center
at 2pm,
to be followed by a reception in the courtyard:

Guest Speaker

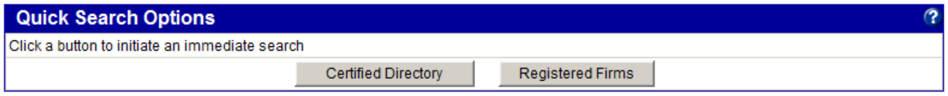
Mary Wollstone
Council President, CEO of SBE, Inc.

To add vendors

1. Go to the **Vendor List** tab.
2. Click **Add Vendors**.

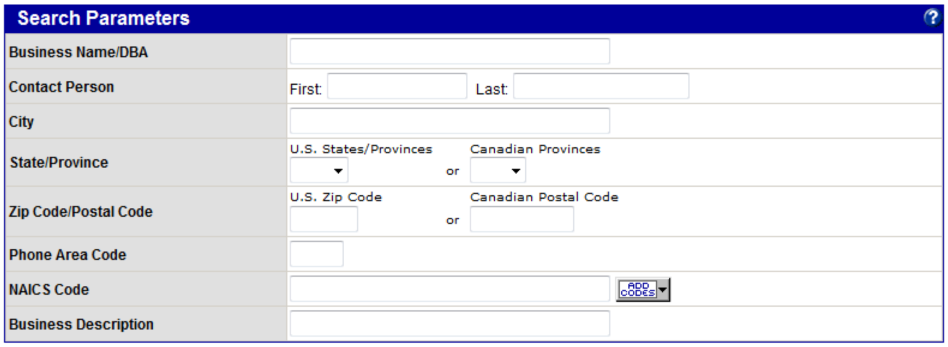


3. To quickly view and add vendors of all certified or registered firms, click **Certified Directory** or **Registered Firms**.

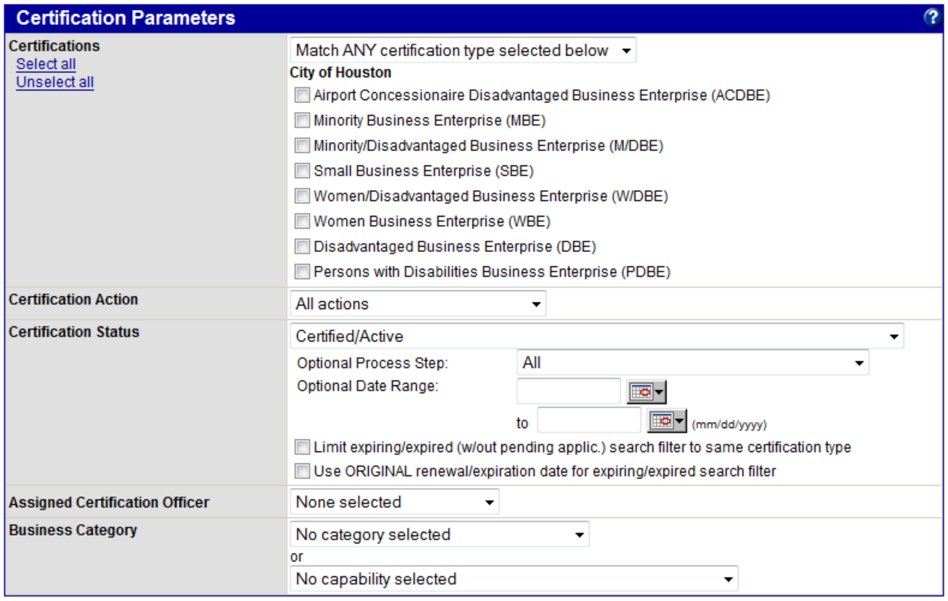


NOTE: Buttons displayed will be based on your organization's configuration

4. To search for vendors using general search fields, in the **Search Parameters** area, enter or select the fields by which you want to filter your search.

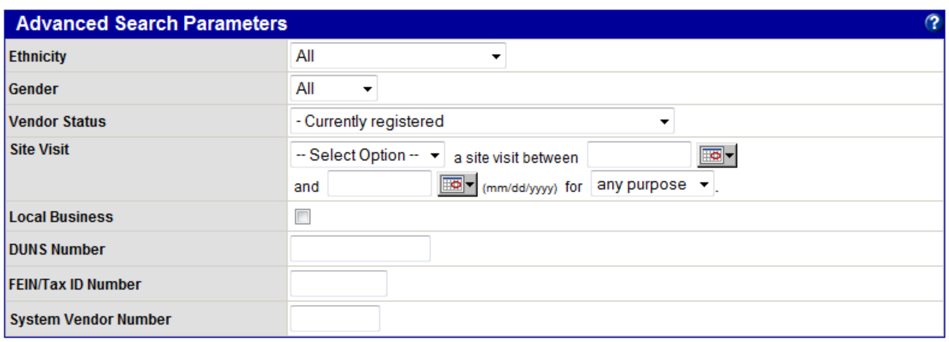


5. To search for vendors with specific certification information, in the **Certification Parameters** area, enter or select the fields by which you want to filter your search.



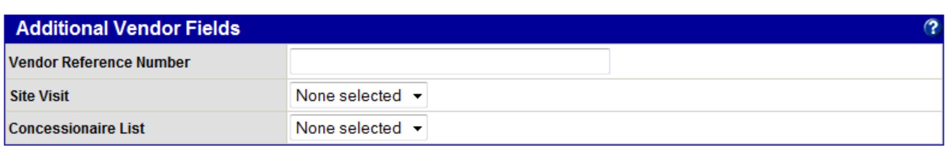
Certification Parameters	
Certifications Select all Unselect all	Match ANY certification type selected below **City of Houston** ☐ Airport Concessionaire Disadvantaged Business Enterprise (ACDBE) ☐ Minority Business Enterprise (MBE) ☐ Minority/Disadvantaged Business Enterprise (M/DBE) ☐ Small Business Enterprise (SBE) ☐ Women/Disadvantaged Business Enterprise (W/DBE) ☐ Women Business Enterprise (WBE) ☐ Disadvantaged Business Enterprise (DBE) ☐ Persons with Disabilities Business Enterprise (PDBE)
Certification Action	All actions
Certification Status	Certified/Active Optional Process Step: All Optional Date Range: to (mm/dd/yyyy) ☐ Limit expiring/expired (w/out pending applic.) search filter to same certification type ☐ Use ORIGINAL renewal/expiration date for expiring/expired search filter
Assigned Certification Officer	None selected
Business Category	No category selected or No capability selected

6. To search for vendors of a specific ethnicity, gender, or status, or by a specific DUNS, FEIN/Tax ID, or system vendor number, in the **Advanced Search Parameters** area, enter or select the fields by which you want to filter your search.



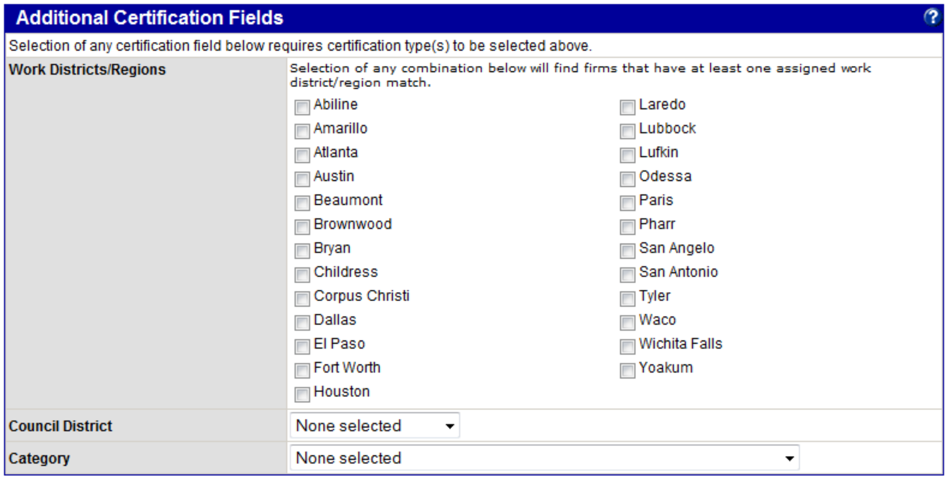
Advanced Search Parameters	
Ethnicity	All
Gender	All
Vendor Status	- Currently registered
Site Visit	-- Select Option -- a site visit between and (mm/dd/yyyy) for any purpose .
Local Business	☐
DUNS Number	
FEIN/Tax ID Number	
System Vendor Number	

7. To search for vendors by reference number or by site list or concessionaire status, in the **Additional Vendor Fields** area, enter or select the fields by which you want to filter your search.

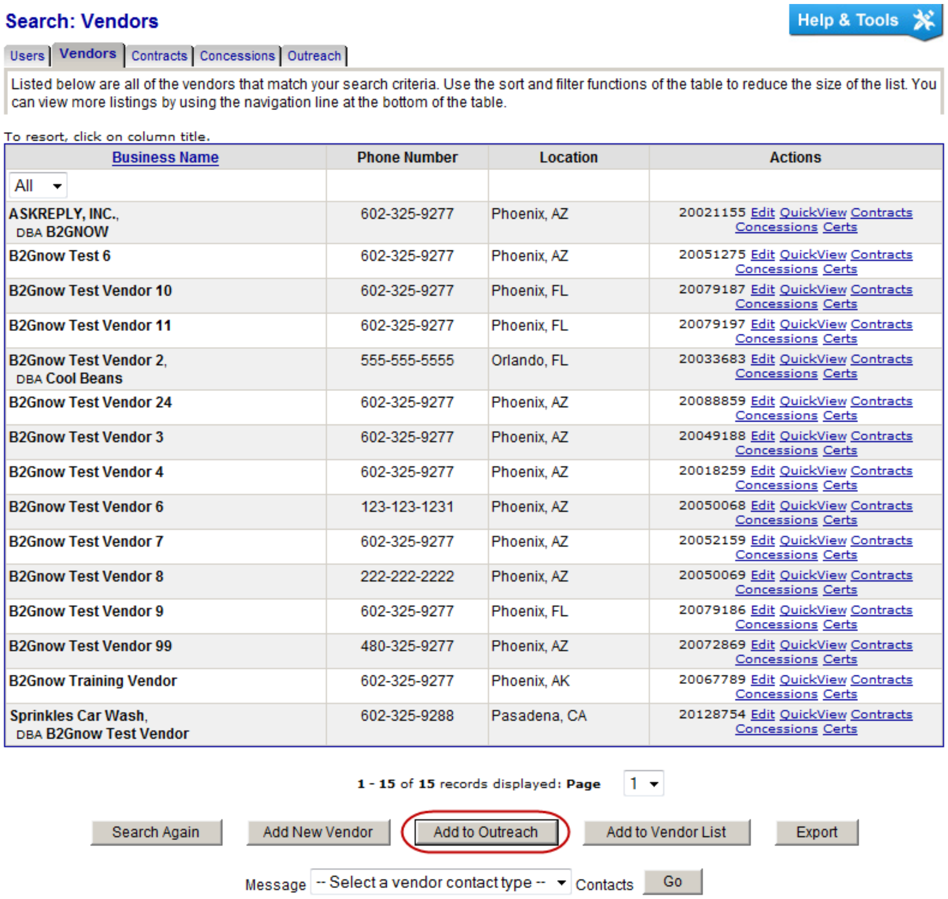


Additional Vendor Fields	
Vendor Reference Number	
Site Visit	None selected
Concessionaire List	None selected

8. Search for vendors by district or category, in the **Additional Certification Fields** area, enter or select the fields by which you want to filter your search.

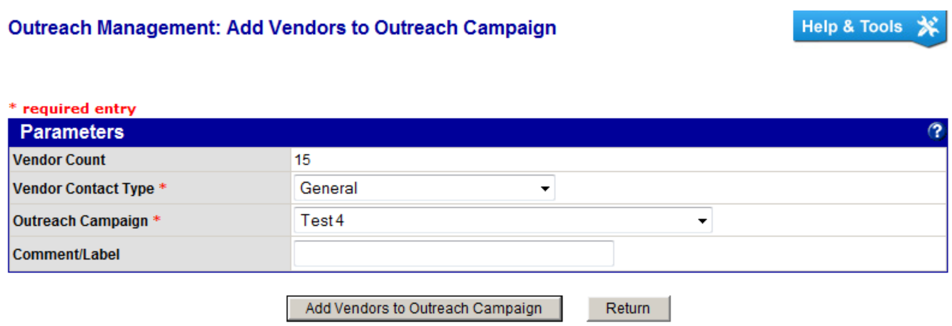


9. Click **Search All Matches**.
   The search results display.
10. Click the **Add to Outreach** button, and then click **OK** to verify.



Business Name	Phone Number	Location	Actions
All			
ASKREPLY, INC., DBA B2GNOW	602-325-9277	Phoenix, AZ	20021155 Edit QuickView Contracts Concessions Certs
B2Gnow Test 6	602-325-9277	Phoenix, AZ	20051275 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 10	602-325-9277	Phoenix, FL	20079187 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 11	602-325-9277	Phoenix, FL	20079197 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 2, DBA Cool Beans	555-555-5555	Orlando, FL	20033683 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 24	602-325-9277	Phoenix, AZ	20088859 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 3	602-325-9277	Phoenix, AZ	20049188 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 4	602-325-9277	Phoenix, AZ	20018259 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 6	123-123-1231	Phoenix, AZ	20050068 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 7	602-325-9277	Phoenix, AZ	20052159 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 8	222-222-2222	Phoenix, AZ	20050069 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 9	602-325-9277	Phoenix, FL	20079186 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 99	480-325-9277	Phoenix, AZ	20072869 Edit QuickView Contracts Concessions Certs
B2Gnow Training Vendor	602-325-9277	Phoenix, AK	20067789 Edit QuickView Contracts Concessions Certs
Sprinkles Car Wash, DBA B2Gnow Test Vendor	602-325-9288	Pasadena, CA	20128754 Edit QuickView Contracts Concessions Certs

11. On the **Outreach Management: Add Vendors to Outreach Campaign** page, select the **Vendor Contact Type** and **Outreach Campaign**, and then enter a comment, if necessary, such as "Construction, DBE, Expired."



NOTE: Use a comment/label that describes the type of search you ran. This differentiates vendors added from multiple searches.

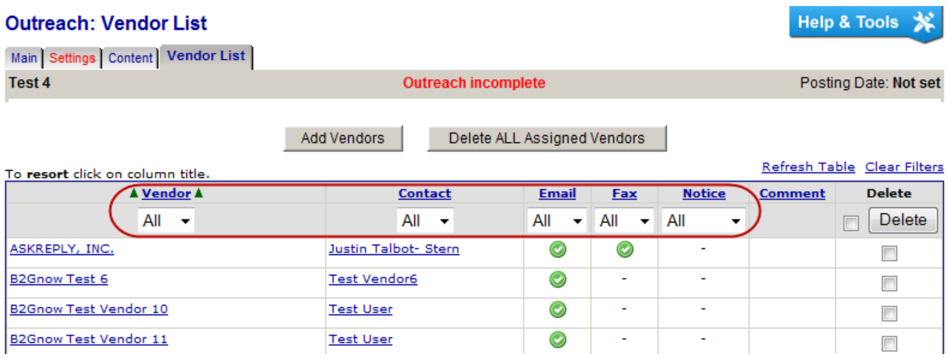
12. Click **Add Vendors to Outreach** Campaign, and then click **OK** to verify you want to add the vendors to the selected outreach campaign.
    The Outreach Management: Vendors Added to Outreach page displays.
13. To return to the campaign, click **View Outreach Summary**.

You can repeat this process to search and add as many sets of vendors as you need. Although there is a per search limit of 5,000 matches, this limit does not apply to the number of firms you can add to your campaign.

The vendor list can be sorted and filtered.

To sort or filter the campaign vendor list

1. If necessary, go to the **Vendor List** tab for the campaign.
2. Click a column heard to sort, use a drop down menu to filter.

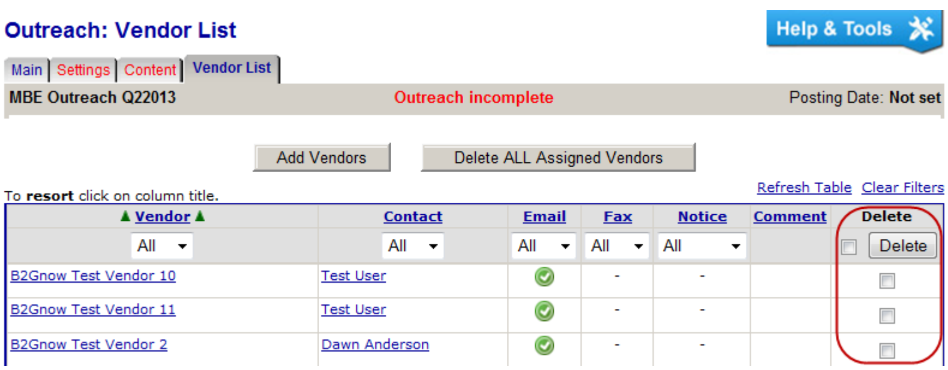


To delete a vendor

1. If necessary, go to the **Vendor List** tab for the campaign.
2. In the **Delete** column, select the check box for the vendor you want to delete.
3. Click the **Delete** button, and then click **OK** to verify you want to delete the vendor from the campaign.

To delete all vendors on the page

1. If necessary, go to the **Vendor List** tab for the campaign.
2. Select the check box to the left of the **Delete** button, and then click **Delete**.



3. Click **OK** to verify you want to delete the selected vendors from the campaign.

To delete all vendors assigned to the campaign

1. If necessary, go to the **Vendor List** tab for the campaign.
2. Click the **Delete ALL Assigned Vendors** button.
3. Click **OK** to verify you want to delete all of the vendors from the campaign.

Releasing outreach campaigns

As you create and edit your outreach campaign, the status on the campaign's Main tab changes from "Outreach incomplete" to "Outreach pending release." ***The outreach campaign will not be sent or displayed until you release it***.

To release a campaign

1. If necessary, locate and open the campaign.
2. Click the **release campaign** hyperlink.

The first campaign notification will be released on the date you specified in the Outreach Dates area on the Outreach: Update Settings tab. You can still update the campaign content and vendor lists up to the release date. If you no longer want to send the campaign, you can change the campaign status by clicking the Reverse Release hyperlink on the Main tab, but must do so prior to the release date.

NOTE: Outreach notices are sent by the system every hour on the hour starting at 8am EST. Depending on the time you release the campaign, you will usually have up to one hour to reverse the release. Once the campaign is sent out, it cannot be reversed.

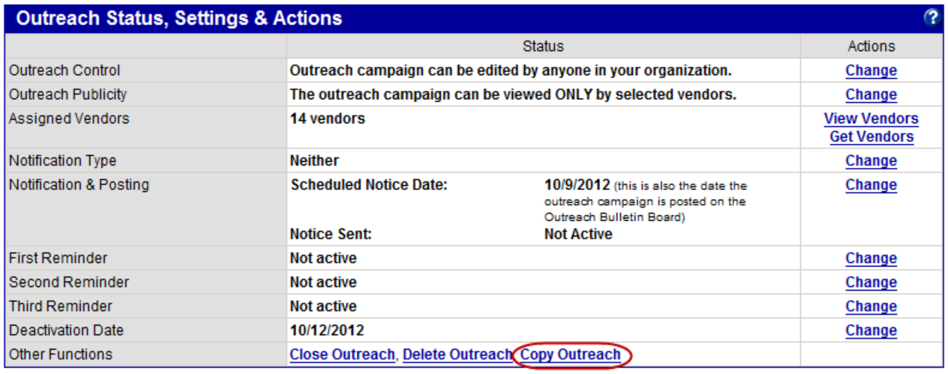
Outreach campaigns set for release on a later date will be sent out in the first batch of the day (8am EST).

Copying outreach campaigns

If you need to create a similar campaign to one you already created, you can copy the existing campaign instead of creating a new one. When copying a campaign, you can specify which settings you want to retain, such as the vendor list or the campaign settings.

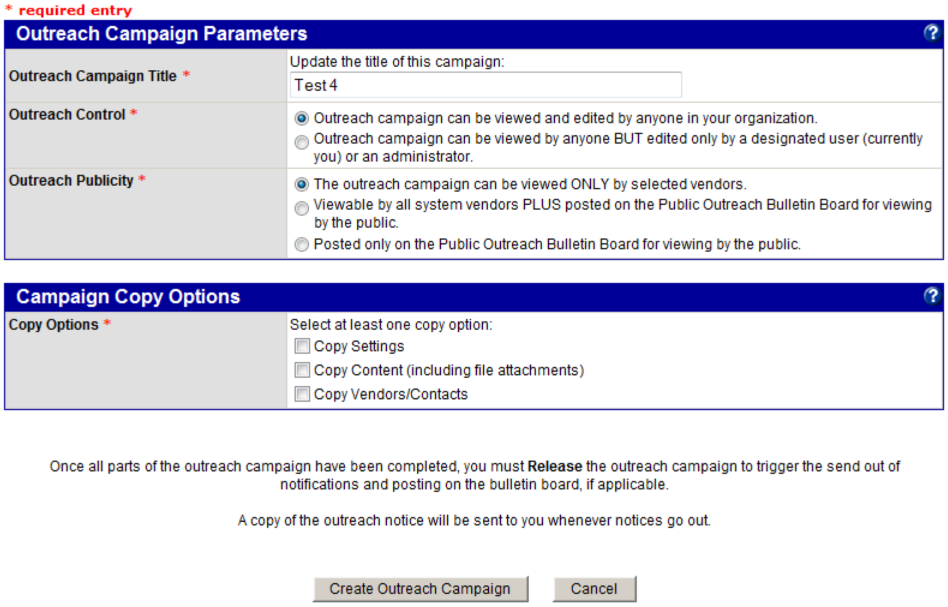
To copy a campaign

1. Locate and open the campaign you want to copy.
2. Click the **Copy Outreach** hyperlink.



Outreach Status, Settings & Actions	Status	Actions
Outreach Control	Outreach campaign can be edited by anyone in your organization.	Change
Outreach Publicity	The outreach campaign can be viewed ONLY by selected vendors.	Change
Assigned Vendors	14 vendors	View Vendors Get Vendors
Notification Type	Neither	Change
Notification & Posting	Scheduled Notice Date: 10/9/2012 (this is also the date the outreach campaign is posted on the Outreach Bulletin Board) Notice Sent: Not Active	Change
First Reminder	Not active	Change
Second Reminder	Not active	Change
Third Reminder	Not active	Change
Deactivation Date	10/12/2012	Change
Other Functions	Close Outreach, Delete Outreach, Copy Outreach	

3. In the **Outreach Campaign Title** field, update the campaign title to something new.
4. In the **Campaign Copy Options** area, select the items you want to copy to the new campaign.



5. Click **Create Outreach Campaign**.

Outreach Status, Settings & Actions

	Status		Actions
Outreach Control	Outreach campaign can be edited by anyone in your organization.		Change
Outreach Publicity	The outreach campaign can be viewed ONLY by selected vendors.		Change
Assigned Vendors	14 vendors		View Vendors Get Vendors
Notification Type	Neither		Change
Notification & Posting	Scheduled Notice Date: Notice Sent:	10/9/2012 (this is also the date the outreach campaign is posted on the Outreach Bulletin Board) Not Active	Change
First Reminder	Not active		Change
Second Reminder	Not active		Change
Third Reminder	Not active		Change
Deactivation Date	10/12/2012		Change
Other Functions	Close Outreach, Delete Outreach, Copy Outreach		

6. Update the incomplete settings, and then release the campaign.

Composing your message

When composing your message, make your information and instructions easy to understand.

Composing your announcement

Generally speaking, an announcement is composed of four parts – Heading, Pitch, Fine Print, and Directions (if applicable).

Heading: List the basics: name of event, date, sponsoring group, and location. This information appears in the heading of your printed event announcement. For example:

> Fourth Annual Business Mingle
> September 30, Women's Business Council (Hopedale, MA)

Pitch: Start with an opening paragraph. Include the name and date of the event, the sponsoring group, and the general focus. For example:

> On the 30th of September, the Women's Business Council is proud to host the Fourth Annual Business Mingle - a day of networking, socializing, and business seminars featuring secrets of the trade.

Then write your pitch, providing event details, such as activities, meals, and speakers.

The Fine Print: Enter the specifics. People want to know:

- When the site opens and closes.
- How much it costs, if applicable.
- How to make reservations.
- Any other important information.

Directions: Give directions from reasonable points, including exit numbers and highway names; compass directions ("Take exit 32 east - W. Main St., Millbury."); landmarks ("Turn right after the Dairy Queen."), but use them in addition to, not in place of, street names and numbers; and mileage from one point to another ("Follow Rte 32 for three miles, then left onto Jones Rd.").

Sample messages

The following are sample messages. Please note that the events posted are fictional events. Samples are what the vendors would view in their email.

Sample – Open House

MWDBE.com Outreach Notification

Organization: B2Gnow
Project: Town Government Open House

Town Government Open House

Begins Tuesday, October 10 at 7:00 PM
Morse Institute Library

2013 Town Government Open House

The public is invited to a Town Government Open House on Tuesday, October 10 at 7pm at the Town Library, lower level. This event will provide an opportunity for citizens to meet representatives of many of the Town's boards and committees, including their Town Meeting Members, to better understand what they do, and to explore volunteer opportunities. The Open House is sponsored by the Town Board of Selectmen and the Town Chapter of the League of Women Voters. (The LWV is an independent organization promoting citizen participation in government.)

Town Meeting Members, as well as chairs and members of the Town's elected and appointed boards, commissions and committees are encouraged to attend and to submit information in advance that will be provided to attendees.

This may be done by completing a form at http://www.ourtown.org/openhouse.

Business owners interested in doing business with Town are also encouraged to register and attend. They may register at http://ourtown.org/OpenHouse.

For more information, please call the Selectmen's office at (555) 555-5555, or contact the LWV at openhouse@ourtown.org.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD
To view all notices, visit: http://www.mwdbe.com/L.asp?GO=1061&TID=ABCD

MWDBE.com
Diversity Management System, powered by B2Gnow
http://www.MWDBE.com/

Sample – Conference Sponsorship

MWDBE.com Outreach Notification

Organization: B2Gnow
Project: MWDBE Conference - Sponsorship Info

2013 MWDBE Annual Conference Sponsorship Information

Why Should You Be A Sponsor?

Conference sponsorship is a way to showcase your organization's technologies, products and services to substance abuse professionals, managers, staff and decision-makers. Sponsorship creates exposure for your organization, provides an opportunity to broaden your contact with substance abuse professionals, allows you to promote your message and services with these professionals and assists you in increasing your awareness of new trends and pressing concerns in the Illinois addictions field.

Expected Attendance	250-300

Conference Sponsorship

Organizations wanting to become a Sponsor have numerous price ranges and options from which to choose. The following descriptions are designed to provide you with the information you need to allow your organization to choose your desired level of involvement and exposure to attendees of the MWDBE Conference.

The following sponsorship opportunities are available:

Co-Host:

MWDBE Member- $5,000 Nonmember- $7,500

Conference Sponsor:

MWDBE Member- $1,500 Nonmember- $2,000

Activity Sponsor- For organizations wishing to target a specific day, materials, or social event during the conference, activity sponsorship provides an attractive option. This allows your organization to choose your desired level of involvement and exposure to attendees at the MWDBE Conference. One key reason why attendees come to the MWDBE Conference is to network and establish contact with other professionals in the field, so social events such as the Awards Reception, Luncheons and Breaks are very well attended.

Breaks- Choose Monday morning, Monday afternoon, Tuesday morning, Tuesday afternoon, or Wednesday morning:

Sole Sponsor- $500 Co-Sponsor- $300

Breakfast- Choose Monday, Tuesday or Wednesday morning:

Sole Sponsor- $1,500 Co-Sponsor- $800

Lunch- Choose Monday, Tuesday or Wednesday

Sole Sponsor- $4,000 Co-Sponsor- $2,500

Awards Reception

Sole Sponsor- $6,000 Co-Sponsor- $2,500

Keynote- Choose Monday, Tuesday or Wednesday

Sole Sponsor- $1,500 Co-Sponsor- $800

Workshop- Contact Dawn Anderson to select the workshop to be sponsored

Sole Sponsor- $500 Co-Sponsor- $300

We have limited sponsorship opportunities available which will be awarded first-come, first-served, so please act quickly! Should your organization be interested in a sponsorship package not listed, please contact Dawn Anderson to discuss your interests.

Please Log in to your MWDBE account at http://www.mwdbe.com for additional information regarding applications and terms and conditions.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com
Diversity Management System, powered by B2Gnow
http://www.MWDBE.com/

Sample – Training Notification

MWDBE Outreach Notification

Organization: MWDBE.com
Project: B2Gnow Training Announcement

ATTN: ALL INTERESTED STAFF at the Contract Compliance Office

From: Staff Development & Training Division
Subject: B2Gnow Contract Compliance Software Training

Personal Computer Software training on B2Gnow Contract Compliance Software is being delivered on an ongoing basis. Each one-day session provides hands-on instruction. The beginning levels are designed for those employees with limited access to the system, and intermediate and advance classes will be available to those in Diversity Management and Contract Compliance Offices.

Who Should Attend:

All interested Equal Opportunity, Purchasing, Diversity, and Contract Compliance office personnel who have DIRECT access B2Gnow Contract Compliance Software. Trainees must commit to immediate practice and utilization following each class in order to derive any benefits from this training. All log in information will be given on the first day of the class.

Dates:

See our schedule and sign up online at http://www.mwdbe.com/
Time: 9:00 am - 4:00 pm Room 494
North Towers Building, State Office

Pre-Registration:

REQUIRED. Supervisors must register participants for B2Gnow Contract Compliance Software training by contacting SD&T as outlined above. Training is limited to 10 participants per class and no one will be admitted without prior approval.

NOTE: DUE TO OVERWHELMING DEMANDS, SOFTWARE CLASSES FILL QUICKLY AND WAITING LISTS FORM. IF YOU CAN NOT ATTEND A CLASS, PLEASE CALL TO CANCEL SO THAT SOMEONE ELSE HAS THE OPPORTUNITY TO FILL THAT SLOT. IF YOU DO NOT CALL TO CANCEL, YOU WILL NOT BE RESCHEDULED FOR THAT CLASS.

Please share this information with appropriate staff. Refer content questions to any SD&T Computer Instructor at (800) 123-4567.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com
Diversity Management System, powered by B2Gnow
http://www.MWDBE.com/

Sample – Bid Solicitation

MWDBE.com Outreach Notification

Organization: B2Gnow
Project: Summer Food Service Program (SFSP)

Contract and Competitive Bidding Process

The Invitation for Bid and Contract, used to procure vended meals for the Summer Food Service Program (SFSP), must be used for all contracts and must be competitively bid if the contract will exceed $10,000. The materials were developed to assist program sponsors in procuring a contract and include required materials and instructions for completing the competitive bid process.

Included in The Booklet:

- Procurement Procedures
- Instructions for Completing the Invitation for Bid and Contract
- Sample Food Specifications
- Sample Cold Lunch Menus
- Sample Cold Breakfast Menus
- Sample Vendor Letter
- List of Known Vendors

Included in The Packet:

- Contracts, Grants, Loans and Cooperative Agreement
- Invitation for Bid and Contract Prototype
- Menu Forms
- Performance Guidelines
- Post-Contract Award Summary Sheet
- Required Meal Patterns
- Schedule A—Program Sites

A draft copy of the completed Invitation for Bid and Contract, the proposed menus, and a list of intended vendors must be submitted by April 10, 2007 to the Arizona State Board of Education, Dawn Anderson, Nutrition Programs, 1111 Broadway, Houston, Houston, TX 77003, for approval. The Invitation for Bid and Contract package must be approved by AzSBE before you can begin soliciting bids.

This year the bid materials may be downloaded from the website or you may contact Dawn Anderson at 555-555-5555 or email your request to dawn@b2gnow.com to receive a copy of the bid materials.

To view additional information regarding this bid solicitation, please log into your account.

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com
Diversity Management System, powered by B2Gnow
http://www.MWDBE.com/

Sample – Certification Class

MWDBE.com Outreach Reminder

Organization: B2Gnow
Project: Town Government Open House

How to Complete the M/WBE Certification Class

Organized by: Department of Small Business Services
Division of Economic and Financial Opportunity

Get your application right the first time! Receive assistance from trained certification counselors on how to complete the M/WBE application.

January 27, 2013, 6:00-7:30 P.M.
Department of Small Business Services
1111 Broadway, Houston, Houston, TX 77003This workshop is free of charge!

Who Should Attend

The Department of Small Business Services' Minority- and Women-owned Business Enterprise Program (M/WBE) ensures the participation of minority- and women-owned businesses in the procurement process. Firms that have been in business for more than one year and are at least 51 percent owned by a minority or woman are eligible for certification. Under Local Law 129 of 2005, City buyers are held accountable for specific purchasing goals from City-certified M/WBE vendors. Prime contractors are also asked to meet certain M/WBE goals in their subcontracting. All certified M/WBEs have access to free counseling and seminars to help them access City contracting opportunities and are listed in a searchable public online directory that is used by purchasing officers and contracting agencies to find the goods and services they need. Access info about the M/WBE program, including downloadable applications at: http://www.mwdbe.com/getcertified

Additional Information:

Telephone: 555-555-5555

To view the notice, visit: http://www.mwdbe.com/L.asp?GO=1062&TID=ABCD

MWDBE.com
Diversity Management System, powered by B2Gnow
http://www.MWDBE.com/

Creating Vendor Lists

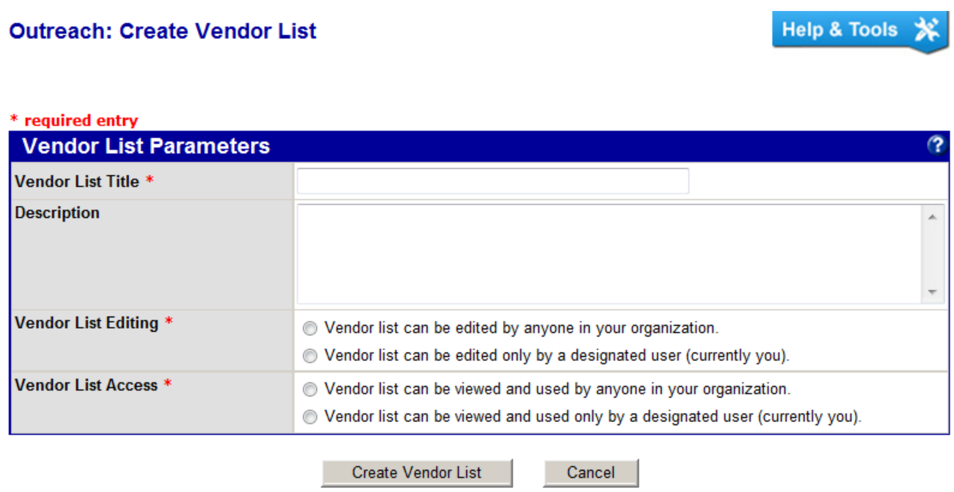
If you expect to send multiple outreach campaigns to the same vendor lists, or would like to create lists for other staff to use, you can create them for easy access.

You create the list, specifying list settings, such as who can view the list, and then you add vendors to the list.

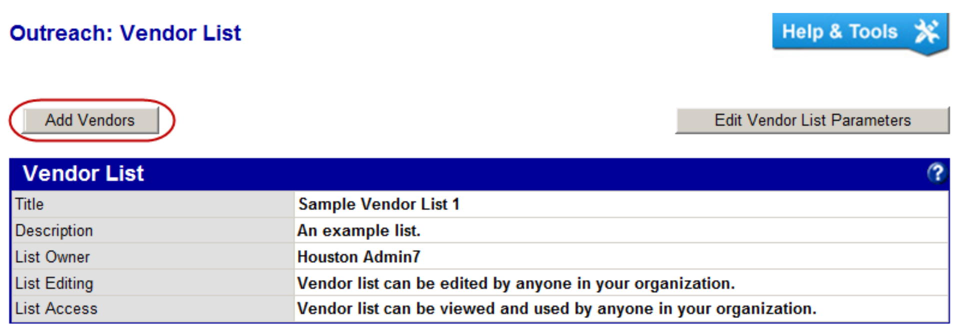
To create a vendor list

1. Open the **Create** menu, and then click **New Vendor List**.
2. In the **Vendor List Parameters** box, complete the following:

   Vendor List Title: Enter a title for the list.
   Description: Describe the list.
   Vendor List Editing: Specify who can edit the list.
   Vendor List Access: Specify who can view and use the list.

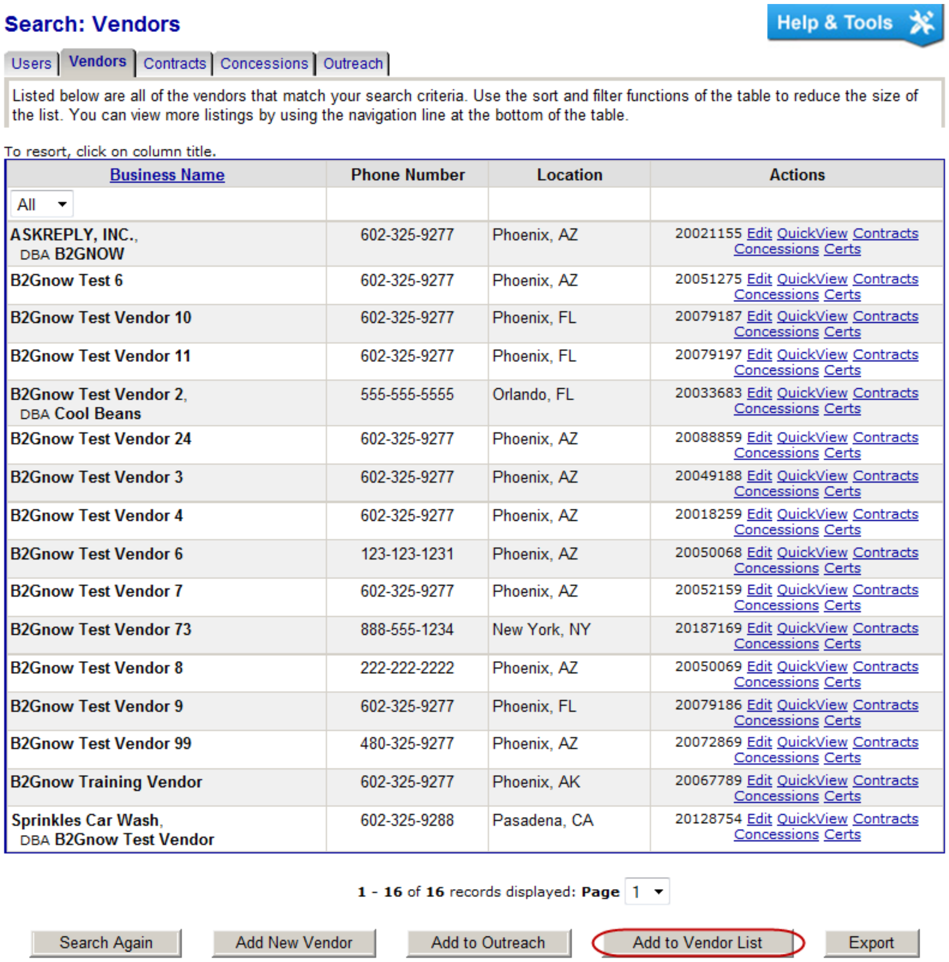


3. Click **Create Vendor List**.
   A list with the basic parameters is created.
4. Click **Add Vendors**.



5. On the **Search: Vendors** page, enter the criteria by which you want to complete the search, and then click **Search All Matches**.

6. At the bottom of the search results page, click **Add to Vendor List**.



Search: Vendors

Help & Tools

Users | Vendors | Contracts | Concessions | Outreach

Listed below are all of the vendors that match your search criteria. Use the sort and filter functions of the table to reduce the size of the list. You can view more listings by using the navigation line at the bottom of the table.

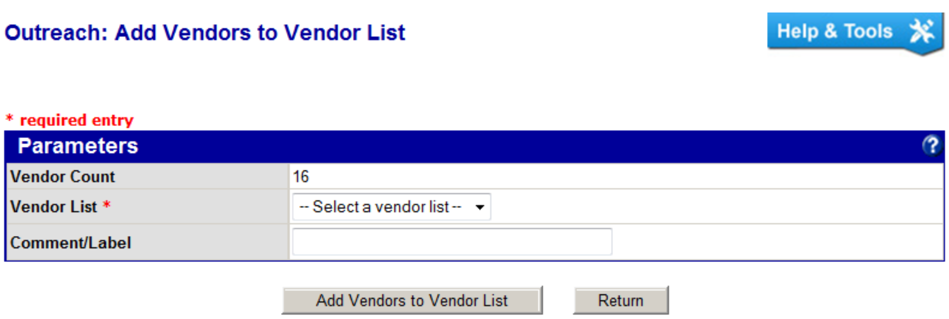
To resort, click on column title.

Business Name	Phone Number	Location	Actions
All			
ASKREPLY, INC., DBA B2GNOW	602-325-9277	Phoenix, AZ	20021155 Edit QuickView Contracts Concessions Certs
B2Gnow Test 6	602-325-9277	Phoenix, AZ	20051275 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 10	602-325-9277	Phoenix, FL	20079187 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 11	602-325-9277	Phoenix, FL	20079197 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 2, DBA Cool Beans	555-555-5555	Orlando, FL	20033683 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 24	602-325-9277	Phoenix, AZ	20088859 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 3	602-325-9277	Phoenix, AZ	20049188 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 4	602-325-9277	Phoenix, AZ	20018259 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 6	123-123-1231	Phoenix, AZ	20050068 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 7	602-325-9277	Phoenix, AZ	20052159 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 73	888-555-1234	New York, NY	20187169 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 8	222-222-2222	Phoenix, AZ	20050069 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 9	602-325-9277	Phoenix, FL	20079186 Edit QuickView Contracts Concessions Certs
B2Gnow Test Vendor 99	480-325-9277	Phoenix, AZ	20072869 Edit QuickView Contracts Concessions Certs
B2Gnow Training Vendor	602-325-9277	Phoenix, AK	20067789 Edit QuickView Contracts Concessions Certs
Sprinkles Car Wash, DBA B2Gnow Test Vendor	602-325-9288	Pasadena, CA	20128754 Edit QuickView Contracts Concessions Certs

1 - 16 of **16** records displayed: **Page** 1

Search Again | Add New Vendor | Add to Outreach | Add to Vendor List | Export

7. Click **OK** to confirm you want to add the vendors to the vendor list.
8. On the **Outreach: Add Vendors to Vendor List** page, select the name of the list to which you want to add vendors, click **Add Vendors to Vendor List**, and then click **OK**.



Outreach: Add Vendors to Vendor List

Help & Tools

* required entry

Parameters	
Vendor Count	16
Vendor List *	-- Select a vendor list --
Comment/Label	

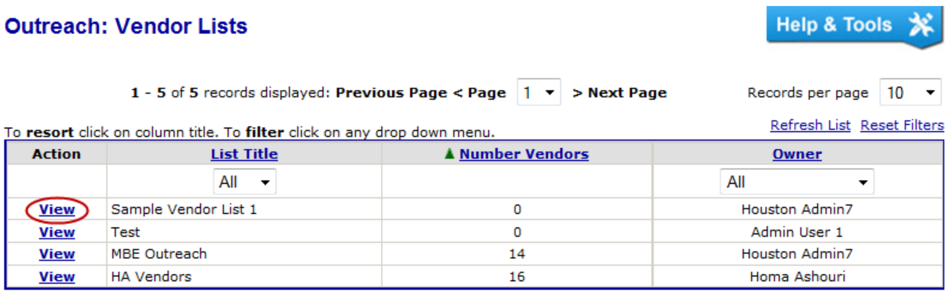
Add Vendors to Vendor List | Return

NOTE: Use a comment/label that describes the type of search you ran. This will differentiate vendors added from multiple searches.

You can repeat this process to search and add as many sets of vendors as you need. Although there is a per search limit of 5,000 matches, this limit does not apply to the number of firms you can add to your campaign.

To view all vendor lists

1. Open the **View** menu, and then click **Vendor Lists**.
2. To view a specific list, click the **View** hyperlink for the list.

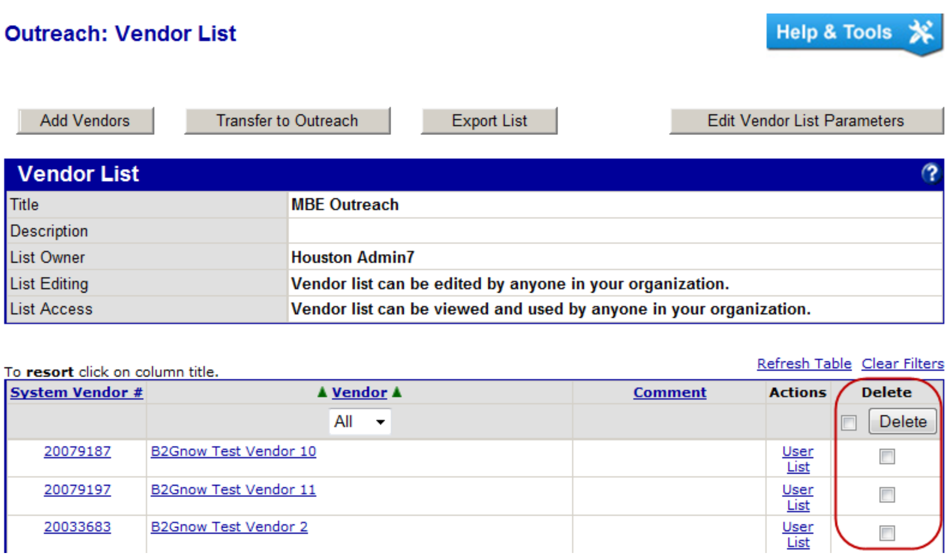


Working with vendor lists

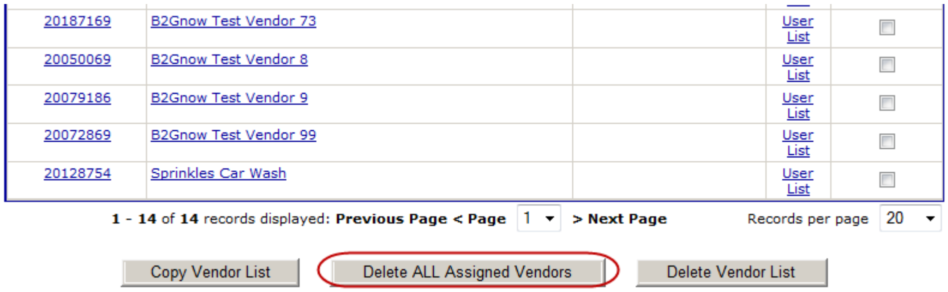
You can work with and manage your vendor lists by adding or deleting vendors, adding the list to an outreach campaign, exporting vendor details into a comma-separated values (.csv) file, editing list settings, and copying the vendor list.

To delete a vendor from a vendor list

1. On the **Outreach: Vendor List** page, click the **View** hyperlink for the list you want to open.
2. To delete a specific vendor, select the check box for the vendor you want to delete, click the **Delete** button, and then click **OK**.

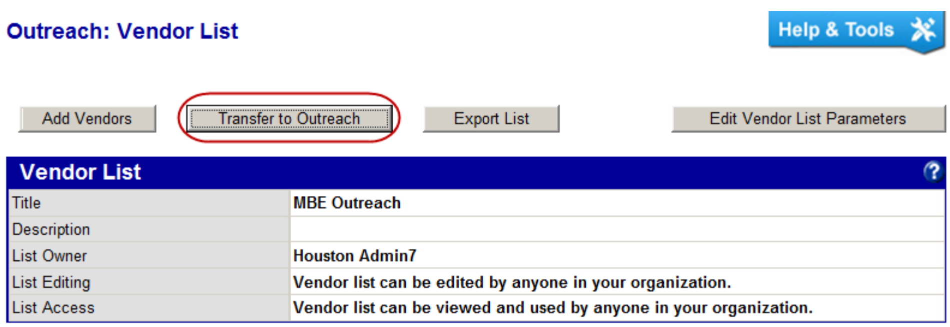


3. To delete the entire list, click **Delete ALL Assigned Vendors**, click **OK**, and then click **OK** again.



To add a vendor list to an outreach campaign

1. On the **Outreach: Vendor List** page, click the **View** hyperlink for the list you want to open.
2. Click **Transfer to Outreach**, and then click **OK** to confirm you want to add the vendors in the selected list to a campaign.
   The Outreach Management: Add Vendors to Outreach Campaign page displays.

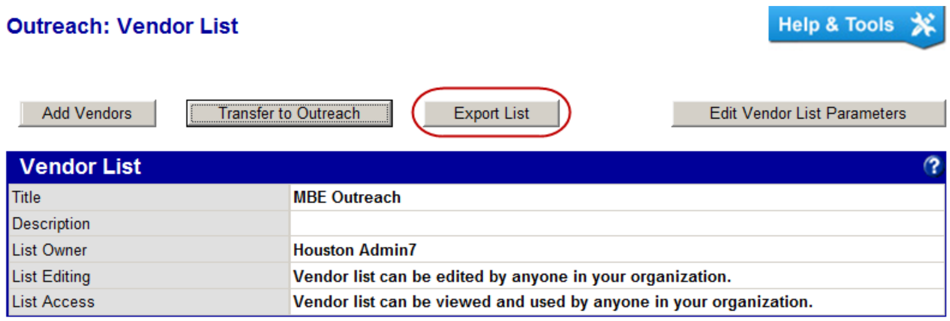


3. From the **Vendor Contact Type** list, select the contact to which you want to send the campaign.

4. From the **Outreach Campaign List**, select the name of the campaign.
5. Click **Add Vendors to Outreach Campaign**, and then click OK to confirm you want to add the list to the campaign.

To export vendor details

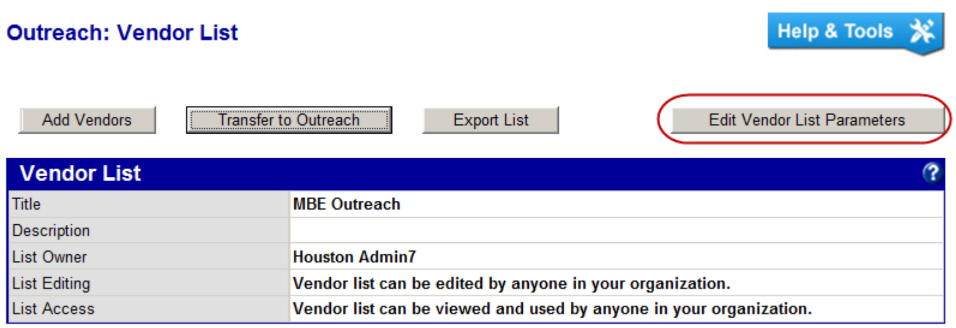
1. On the **Outreach: Vendor List** page, click the **View** hyperlink for the list you want to open.
2. Click **Export List**.
   The Search: Export Vendors page displays.



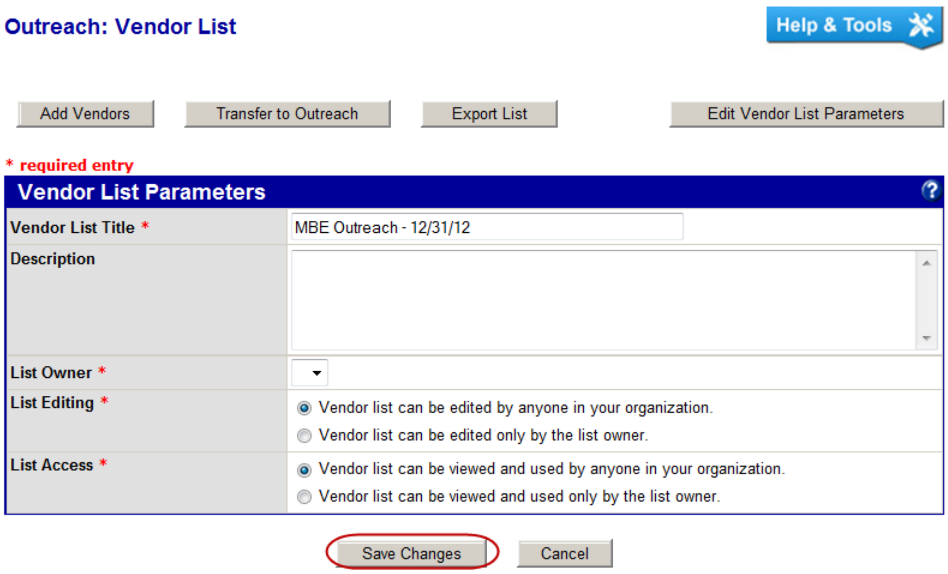
3. Select the fields you want to export to a .csv file, click **Export Records**, and then save the file.

To edit vendor list settings

1. On the **Outreach: Vendor Lists** page, click the **View** hyperlink for the list you want to open.
2. Click **Edit Vendor List Parameters**.

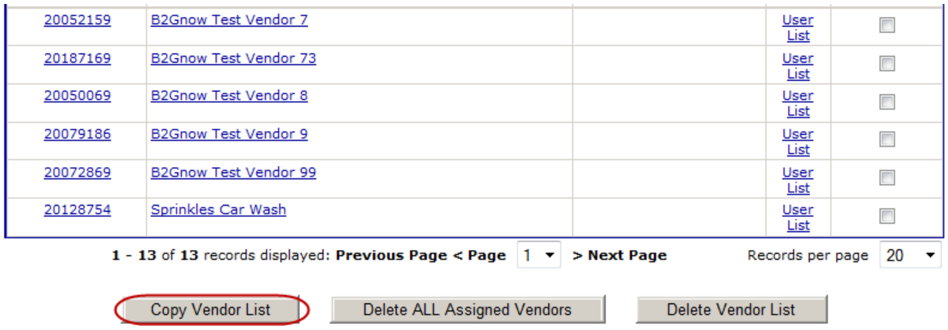


3. Edit the settings, and then click **Save Changes**.

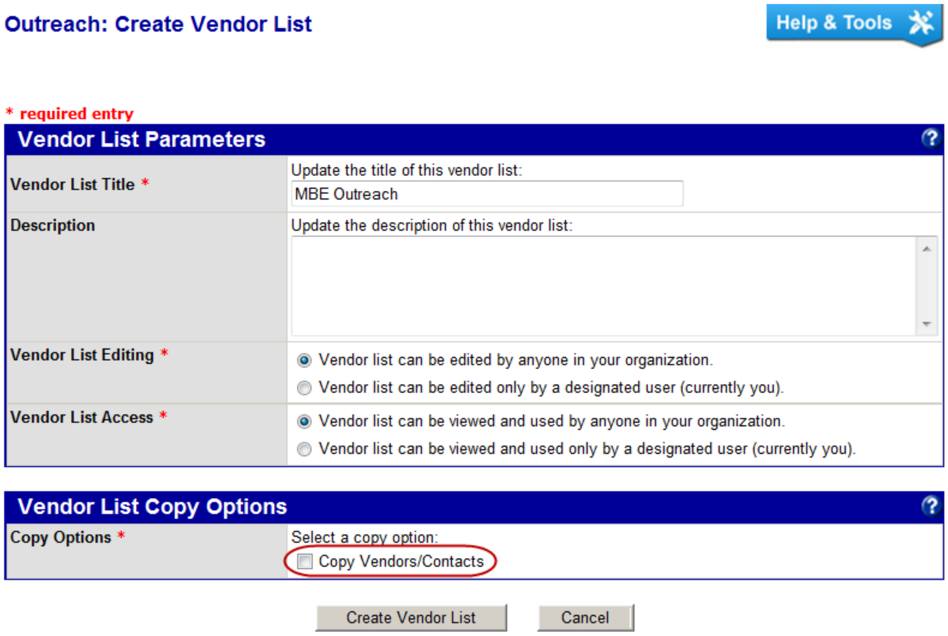


To copy a vendor list

1. On the **Outreach: Vendor Lists** page, click the **View** hyperlink for the list you want to open.
2. Click **Copy Vendor List**.
   The Outreach: Create Vendor List page displays.



3. In the **Vendor List Copy Options** box, select **Copy Vendors/Contacts**.



4. Click **Create Vendor List**.

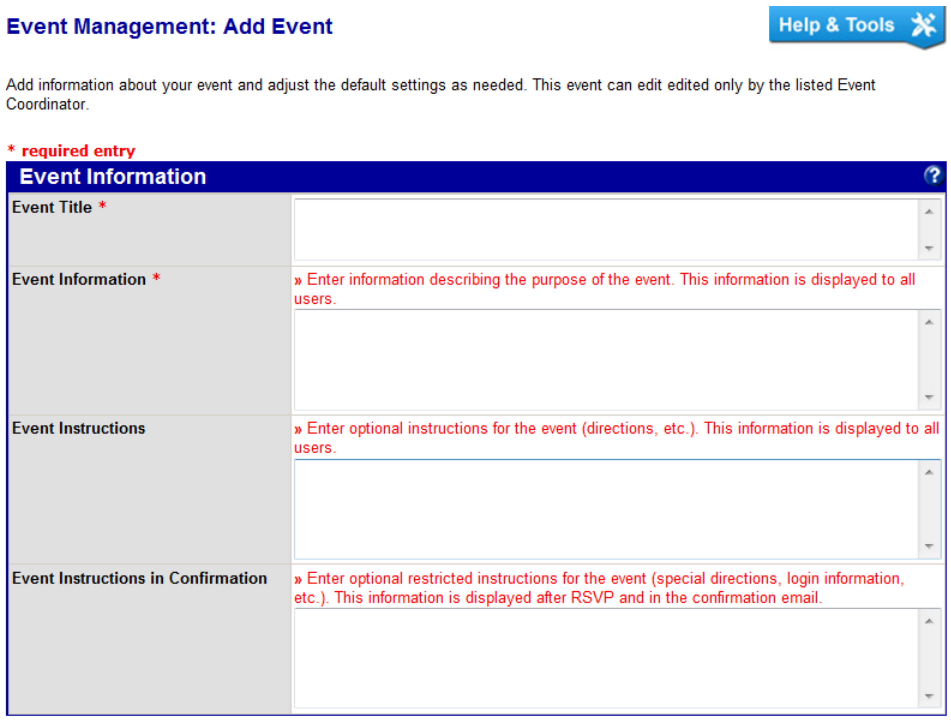
Creating events

Through the Event Management module, you can create and manage events and track attendees. When you create an event, you can specify the event type and who can view and RSVP for the event. For example, you can create a Training event for staff users or a Vendor Fair event available to all vendors and the general public. Users view the event list and RSVP to specific events through the Transactions: Event Management page.

To create an event

1. Open the **Create** menu, and then click **New Event**.
   The Event Management: Add Event page displays.
2. In the **Event Information** box, complete the following:

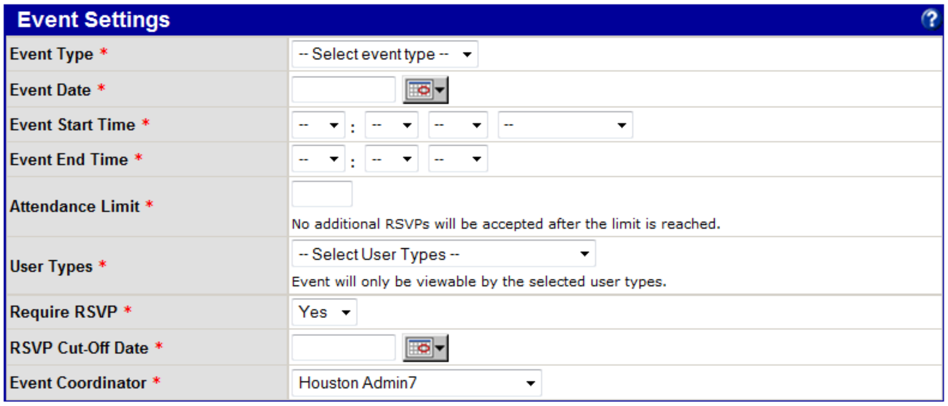
   Event Title: Enter the title of the event
   Event Information: Enter information about the event.
   Event Instructions: Enter special instructions about the event.
   Event Instructions in Confirmation: Enter attendee-only information you want to show after a contact accepts the event invitation.



3. In the **Event Settings** box, complete the following:

   Event Type: Select the type of event you want to create.
   Event Date: Select the date on which the event will take place.
   Event Start Time: Select the time at which the event will start.
   Event End Time: Select the time at which the event will end.
   Attendance Limit: Specify the maximum number of attendees.
   User Types: Specify the types of users who can see the event.

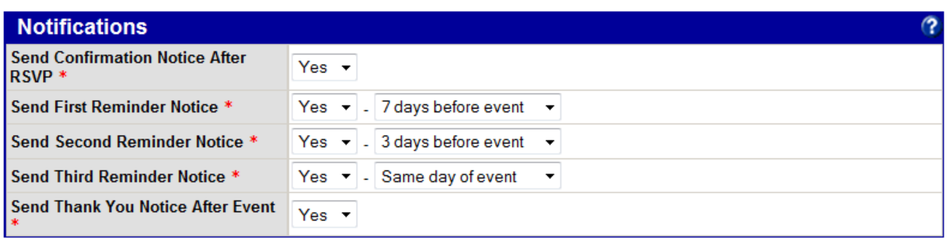
Require RSVP: Specify whether an RSVP is required to attend the event.
RSVP Cut-Off Date: Select the latest date on which attendees can RSVP.
Event Coordinator: Select the name of the person coordinating the event.



Event Settings	
Event Type *	-- Select event type --
Event Date *	
Event Start Time *	-- : -- -- --
Event End Time *	-- : -- --
Attendance Limit *	No additional RSVPs will be accepted after the limit is reached.
User Types *	-- Select User Types -- Event will only be viewable by the selected user types.
Require RSVP *	Yes
RSVP Cut-Off Date *	
Event Coordinator *	Houston Admin7

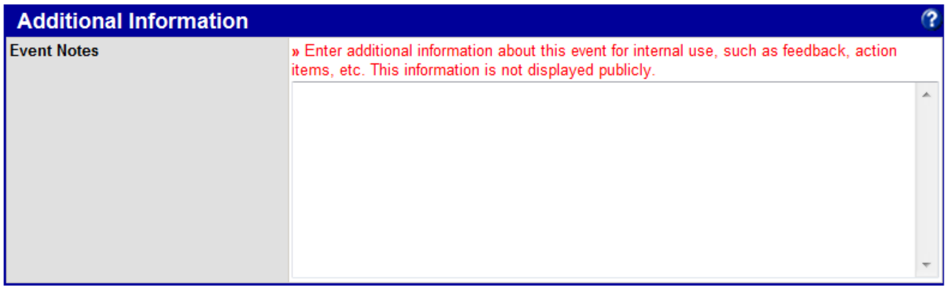
4. In the **Notifications** box, complete the following:

Send Confirmation Notice After RSVP: Specify whether you want to send a confirmation notice to attendees after they RSVP.
Send First Reminder Notice: Specify whether you want to send a reminder notice about the event, and then select the number of days prior to the event that you want attendees to receive the reminder.
Send Second Reminder Notice: Specify whether you want to send a second reminder notice about the event, and then select the number of days prior to the event that you want attendees to receive the reminder.
Send Third Reminder Notice: Specify whether you want to send a third reminder notice about the event, and then select the number of days prior to the event that you want attendees to receive the reminder.
Send Thank You Notice After Event: Specify whether you want to send a thank you notice to attendees after they attend the event.



Notifications	
Send Confirmation Notice After RSVP *	Yes
Send First Reminder Notice *	Yes - 7 days before event
Send Second Reminder Notice *	Yes - 3 days before event
Send Third Reminder Notice *	Yes - Same day of event
Send Thank You Notice After Event *	Yes

5. In the **Additional Information** box, enter any notes or comments you want internal users to view. Additional Information is not displayed publicly.



6. Click **Save**, and then click **OK**.

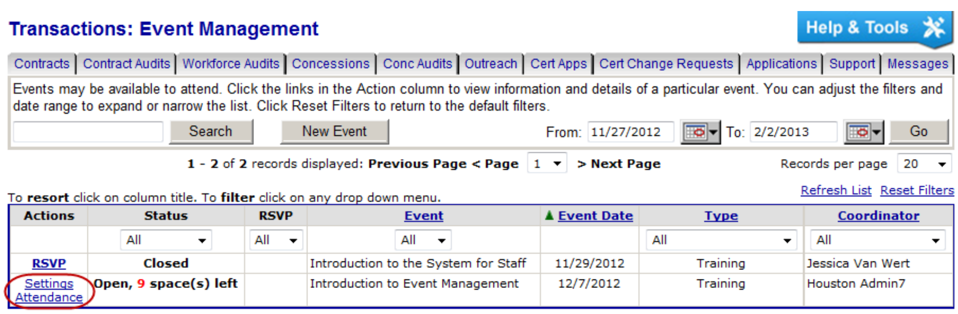
After you create events, users can view and RSVP to them.

Managing events

You view and manage events through the Transactions: Event Management page. You can access and update event settings and work with the attendance list. After an event, you should always log attendants for all registrants.

To view the event list

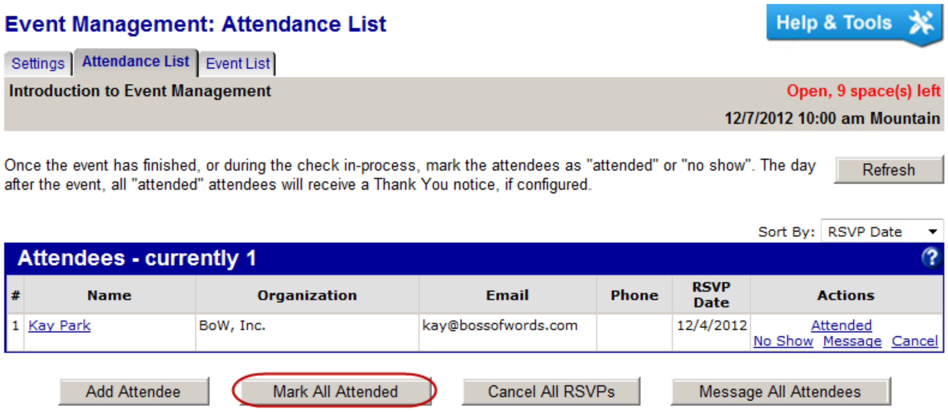
1. Open the **View** menu, and click **Events**.
2. To edit an event, in the **Actions** column, click the **Settings** hyperlink.



3. To view the list of attendees, in the **Actions** column, click the **Attendance** hyperlink.

To manage the attendee list

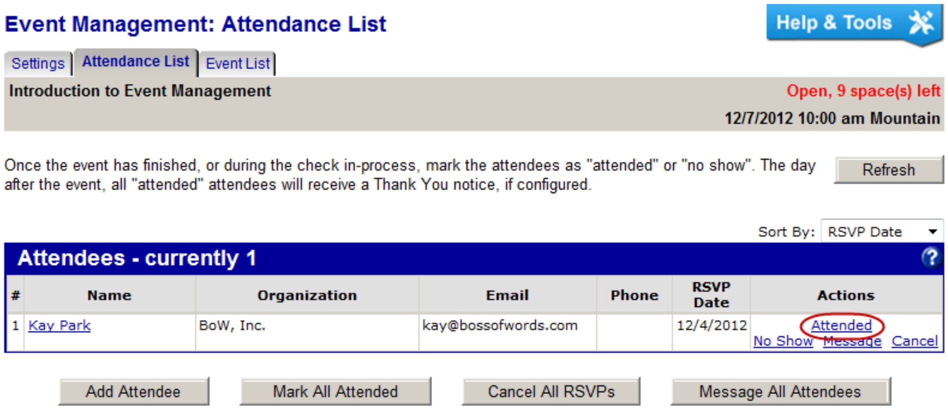
1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Attendance** hyperlink.
   The Event Management: Attendance List displays.
2. To mark all attendees as having attended the event, click **Mark All Attended**.



3. To cancel all RSVPs, click **Cancel All RSVPs**, and then click **OK**.

To manage a specific attendee

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Attendance** hyperlink.
   The Event Management: Attendance List displays.
2. To mark the attendee as having attended the event, click the **Attended** hyperlink for the attendee.



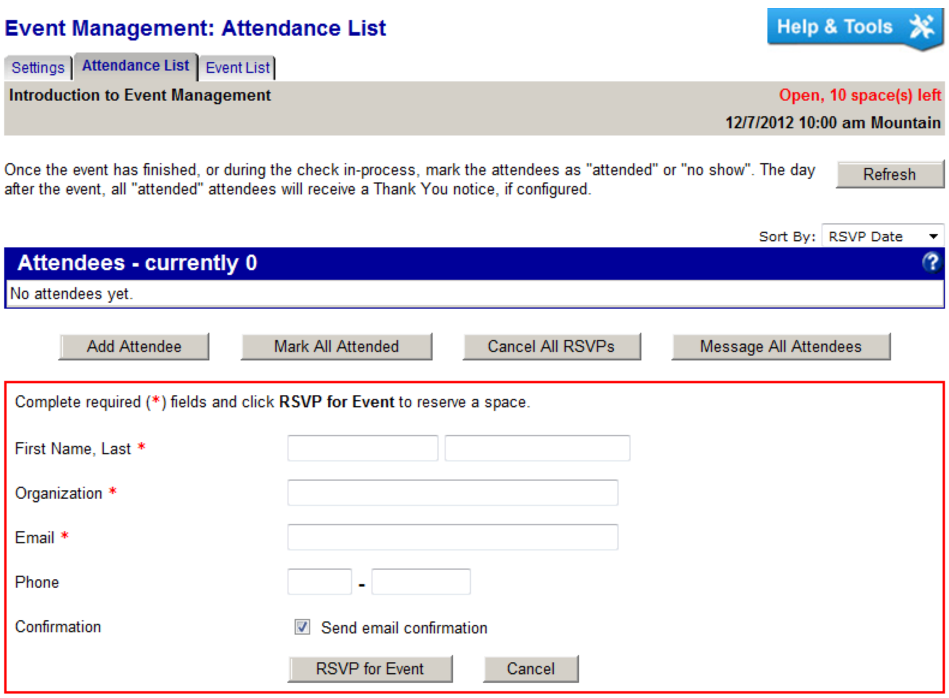
3. To mark the attendee as not having attended the event, click **No Show**.
4. To cancel the RSVP, click **Cancel**, and then click **OK**.
5. To send a message to the attendee, click the attendee’s name or the **Message** hyperlink, complete the fields, click **Review/Next**, and then click **Send**.

To add an attendee RSVP

It is sometimes necessary to add an attendee directly to an event.

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Attendance** hyperlink.
   The Event Management: Attendance List displays.
2. On the Event Management: Attendance List page, click Add Attendee.
3. Complete the following:

   First Name, Last: Enter the attendee's first and last name.
   Organization: Enter the name of the attendee's organization.
   Email: Enter the attendee's email address.
   Phone: Enter the attendee's phone number.
   Confirmation: Select to automatically send an email confirmation when the attendee responds to the invitation.



4. Click **RSVP for Event**.
5. Click **OK** to confirm you want to add the RSVP, and then click **OK** again.

To add notes about the event

1. On the **Transactions: Event Management** page, in the **Actions** column, click the **Setting** hyperlink.
   The Event Management: Edit Event page displays.
2. In the **Additional Information** box, enter any event notes. This information is not displayed publicly.