SUBJECT: GRANT MANAGEMENT SOFTWARE AS A SERVICE (SaaS) SOLUTION

BID #: ESC-0352-18 **OPEN DATE: 1/31/18**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: Service Contract – Three (3) years from date of contract execution with two (2) one (1) year renewal options

AGENCY: Information Technologies Division

BASIS OF AWARD: Highest Scoring Bidder Based on Evaluation Criteria

NUMBER OF BIDS INVITED: 24 **NUMBER RECEIVED:** 6 **OTHER:** 2

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:

Recommend approval to reject Dulles Technology Partners, Inc. for failure to meet the minimum requirements and for failure to submit all addenda in accordance with the specifications and to waive as a minor irregularity missing proof of Florida business license from eCivis, Inc. The information has been verified through the State of Florida's website www.Sunbiz.org.

Recommend approval to move forward with interviews and demonstrations with the four (4) highest scoring bidders listed below in accordance with Section 2.5 of the RFP. One bidder, Coastal Cloud LLC will not be interviewed due to low score.

1. HTC Global Services, Inc.
2. StreamLink Software, Inc.
3. SmartSimple Software Ltd.
4. eCivis, Inc.

Attachments: Recommendation Memo, Tabulation and Scoring Sheets, Rejection Letter and Evaluation Criteria

ANALYST: _____ Annette Burney **RESPECTFULLY SUBMITTED** _____ GREGORY PEASE, CHIEF PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief, Information Technologies Division

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(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

CITY OF JACKSONVILLE

February 23, 2018

03/06/18 10:43:22
Procurement Division

TO: Greg Pease, Chief of Procurement Division

FROM: Michael Turner, PMO Manager
Information Technologies Division

THRU: Kenneth Lathrop, Chief of Information Technologies/CIO

ESC-0352-18 Grant Management Software as a Service (SaaS) Solution

The Information Technologies Division (ITD) in conjunction with the Grant and Contract Compliance Office requests approval to move forward with interviews and demos for ESC-0352-18 Grant Management Software as a Service (SaaS) Solution. On January 31, 2018 Procurement received six (6) vendor bid proposals for ESC-0352-18. The vendor proposals were submitted to the reviewers and evaluators.

Of the six (6) proposals, five (5) were considered valid and were evaluated and scored. The sixth proposal submitted by Dulles Technology Partners, Inc. is recommended for rejection due to vendor not supplying all the required attachments as specified in the RFP.

ITD and the Grants Office recommend moving forward to the next phase of the RFP process by inviting the 4 highest scoring proposals to conduct interviews and demonstrations.

Vendor	Cost (20pts)	Business Requirements (35pts)	Bid Proposal (35pts)	Reference (10 pts)	Total (100pts)
Coast Cloud, LLC	3.90	34.70	20.20	7.67	**66.47**
eCivis, Inc.	7.30	35.00	24.23	6.67	**73.20**
HTC Global Services, Inc.	20.00	31.40	24.10	8.00	**83.50**
SmartSimple Software, Ltd.	8.60	34.80	27.47	7.67	**78.53**
StreamLink Software, Inc.	9.10	35.00	27.60	8.00	**79.70**

Your favorable consideration of this request is appreciated.

CC: Damian Cook, Grant Administrator
John Snyder, Human Services Planner
Michele Harrell, Senior Project Manager
Tom Ossi, Technology Contract and Records Manager

TITLE: GRANT MANAGEMENT SOFTWARE AS A SERVICE (SaaS) SOLUTION

BID NO: ESC-0352-18

OPEN DATE: 1/31/18

ANALYST: Annette Burney

NO. INVITED: (56) No. Received: (6) No Bids: (2)

RECORDED BY: John Hernandez ANNOUNCER: Pearl Mitchell

			Coast Cloud LLC	Dulles Technology Partners	eCivis,Inc.	HTC Global Services, Inc.	SmartSimple Software Ltd.	StreamLink Software, Inc.
		3-YEAR TOTAL:	$ 735,046.75	$ 184,600.00	$ 392,400.00	$ 143,000.00	$ 331,611.00	$ 314,082.00
		NOTES:		Reject - No FL business license / missing 4 addenda	Vendor is licensed in FL, but did not submit proof		*Pricing may include 3% annual service fee for subscription fees.	
ITEM #	DESCRIPTION	POINTS						
1	TOTAL COST OF SERVICES, SOLUTION, AND RATES	20	3.90		7.30	20.00	8.60	9.10
2	SOFTWARE SOLUTION - BUSINESS REQUIREMENT FUNCTIONS	35	34.70		35.00	31.40	34.80	35.00
3	QUALITY OF PROPOSAL AND RESPONSE TO TECHNICAL REQUIREMENTS	35	20.20		24.23	24.10	27.47	27.60
4	CLIENT REFERENCES	10	7.67		6.67	8.00	7.67	8.00
	Total Points	100	66.47		73.20	83.50	78.53	79.70
	Minimum Requirements:		YES	NO	YES	YES	YES	YES
	Experience - Grant Management Software (3 yrs. & SaaS (2 yrs.)		✓	✓	✓	✓	✓	✓
	Client References (>3)		✓	✓	✓	✓	✓	✓
	Insurance / Affadavit		✓	✓	✓	✓	✓	✓
	FL Business License		✓	X	X	✓	✓	✓
	Conflict of Interest:		YES	YES	YES	YES	YES	YES
	Addendums (6):		YES	1, 2	YES	YES	YES	YES

Grant Management Software as a Service (SaaS) Solution

ESC-0352-18

	20 Points	35 Points	35 Points	10 Points	OVERALL	Rank
FIRM	Total Cost of Service, Solution, & Rates	Software Solution-BRD	Quality of Proposal and Response to Technical Requirements	Client References	Total Points (100 max)	
Coastal Cloud LLC						
Damain Cook	3.90	34.70	18.20	8.00	64.80	
Dawn Lockhart	3.90	34.70	22.30	8.00	68.90	
Roger Belcher	3.90	34.70	20.10	7.00	65.70	
Average	3.90	34.70	20.20	7.67	**66.47**	5
eCivics, Inc.						
Damain Cook	7.30	35.00	26.60	6.00	74.90	
Dawn Lockhart	7.30	35.00	19.20	6.00	67.50	
Roger Belcher	7.30	35.00	26.90	8.00	77.20	
Average	7.30	35.00	24.23	6.67	**73.20**	4
HTC Global Services, Inc.						
Damain Cook	20.00	31.40	22.00	8.00	81.40	
Dawn Lockhart	20.00	31.40	22.10	8.00	81.50	
Roger Belcher	20.00	31.40	28.20	8.00	87.60	
Average	20.00	31.40	24.10	8.00	**83.50**	1
SmartSimple Software Ltd.						
Damain Cook	8.60	34.80	28.40	8.00	79.80	
Dawn Lockhart	8.60	34.80	27.80	8.00	79.20	
Roger Belcher	8.60	34.80	26.20	7.00	76.60	
Average	8.60	34.80	27.47	7.67	**78.53**	3
StreamLink Software, Inc.						
Damain Cook	9.10	35.00	28.30	8.00	80.40	
Dawn Lockhart	9.10	35.00	27.60	8.00	79.70	
Roger Belcher	9.10	35.00	26.90	8.00	79.00	
Average	9.10	35.00	27.60	8.00	**79.70**	2

ATTACHMENT A
RESPONSE FORMAT

To maintain comparability and facilitate the evaluation process, Responses shall be organized in the manner set forth below. Tab delineations for each of the five sections would be helpful.

1) **Title Page:** Include RFP Title, RFP Number, Contractor's full name, address, phone number.

2) **Cover Letter:** Include the following:

- Date of Letter.
- RFP Title and Number
- Contractor's full name, address and phone number.
- Names of the persons who will be authorized to make representations for the Contractor, their titles, addresses (including email address) and telephone numbers.
- Contractor's Federal Employer ID Number.
- Acknowledgement that (i) the Response is based on the terms set forth in the RFP and all amendments thereto posted on Buyer's website as of the date of the Response, and (ii) the Contractor will be responsible for monitoring Buyer's website for subsequent amendments and for either maintaining, amending or withdrawing the Response prior to the Response Due Date based on those subsequent amendments.
- Signature of Authorized Representative.

3) **Required Forms.** Attach all forms identified in Section 1 or in the Attachments, if applicable, each signed by an authorized representative. Examples of the forms that may be required include:

- Form 1 - Price Sheet
- Form 2 - Conflict of Interest Certificate
- Form 4 - Client References
- Form 5 - Business Requirement Functions Response
- Form 6 - Response to Technical Requirements
- All issued addenda (Please check the Procurement website prior to submitting your response.)

4) **Proof of Minimum Requirements.** Responses will ONLY be accepted from companies meeting the minimum requirements in Section 1 of the RFP. Contractor must provide clear documentation that they meet the minimum requirements.

5) **Statement of Qualifications.** This portion of the Response will be used to provide the information Buyer needs to evaluate how well the Contractor meets the criteria listed in Attachment B – Evaluation Criteria. Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the Response as non-responsive. Please divide this portion of the Response into subsections that correspond to each of the listed criteria.

(Remainder of page intentionally left blank.)

ATTACHMENT B
EVALUATION CRITERIA

Grant Management Software as a Services (SaaS) Solution

The evaluations will be based upon the following criteria, and Contractors are requested to provide, as a minimum, the information listed under each criterion. **Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the proposal as non-responsive.** Contractors are encouraged to arrange their responses in a format that will offer ready review and evaluation of each criterion.

Criteria	Description of Criteria	Maximum Points Available
Total Cost of Services, Solution, and Rates	The contractor submitting the lowest cost to the City shall receive the maximum number of points for cost, 20 points. Each sub-sequentially higher cost shall be divided into the lowest cost received and the products score% will be multiplied by the maximum points available to render the points. Score = (Lowest Bid/The Bid) X 20	**20**
Software Solution-Business Requirements Functions	The contractor submitting the highest score to the City shall receive the maximum number of points for Business Requirements Functions identified in Form 5, 35 points. Each sub-sequentially lower score shall be divided into the highest score received and the products score% will be multiplied by the maximum points available to render the points. Points = (The Score/Highest Score) X 35	**35**
Quality of Proposal and Response to Technical Requirements	The contractor shall be evaluated on the responses received for Form 6, to clearly define the proposed system and the ability to meet the City's needs.	**35**
Client References	Client References will be evaluated to validate customer satisfaction of the system proposed, implementation, customer support and various other related components.	**10**

(Remainder of page intentionally left blank)

2) Five (5) hard copies of the entire Response.

3) One (1) digital scanned copy (in pdf format) of entire Response, on a separate CD-ROM or flash drive. Large files may be scanned as several separate PDF files.

4) One (1) REDACTED scanned copy of the Response (if necessary pursuant to Section 2.12). This copy should be marked "Confidential – Trade Secret" or something comparable to alert the reader of Contractor's claim of a public records exemption.

5) One (1) digital copy of the contractor's response to the Business Requirements Functions in Excel format delivered on a flash drive.

All copies are to be placed in a sealed package. The outside must be marked with (i) the RFP title and number, and (ii) Contractor's name, address, contact person, and telephone number.

It is the sole responsibility of each Contractor to assure all copies are EXACT duplicates of the original Response. Photocopies or CD copies will be used for the purpose of evaluating the Responses. Any information contained in the original Response which has not been transferred to the CDs or photocopies will NOT be considered. The original document will be used solely for official record keeping and auditing purposes.

2.5 Evaluation of Responses.

A. Buyer will determine the qualifications, interest and availability of Contractors by reviewing all Responses and, when deemed necessary in the sole discretion of Buyer, by conducting formal interviews of selected Contractors.

B. The determination of which Contractors are "best qualified" will be based upon the criteria set forth in this RFP.

C. Buyer will employ the following process steps when evaluating which Contractors are "best qualified":

- Buyer will evaluate Responses using the evaluation criteria set forth in the following table and in Attachment B, Evaluation Criteria.

Response Evaluation Category	Maximum Score
Total Cost of Services, Solution, and Rates	20
Software Solution-Business Requirements Functions	35
Quality of Proposal and Response to Technical Requirements	35
Client References	10

- Based on the scoring of the Responses, Buyer will short-list no fewer than three (3) but no more than five (5) Responses for software demonstrations / oral interviews and sandbox evaluations. If Buyer receives fewer than three (3) responses to this RFP, Buyer reserves the right to proceed to demonstrations / oral interviews and sandbox evaluations with the number of responses received at its sole discretion. Software demonstrations / oral interviews will be conducted via vendor provided WebEx/Go To Meeting etc. Demonstration scripts will be provided in advance. Demonstrations will take place over a single 8 hours workday and will be pre-scheduled with the contractor.

- Buyer will evaluate software demonstrations / oral interviews using the evaluation criteria set forth in the following table.

Software Demonstration / Oral Interview Evaluation Category	Maximum Score
Software Demonstration of Functional Business Areas	40
Technical Presentation of SaaS System Solution / Support / Product Updates	10
Implementation Services Approach and Methodology	30
Qualification and Experience of Proposed Personnel	20

- Vendors will also be required to stand up a standard sandbox environment based on the product submitted in the contractor's bid proposal and provide the three (3) evaluators a login to access the system and experience. Vendor will need to have completed the system set up configuration that was demonstrated. The three (3) users must be set up with System Admin security access in order to perform all roles. Use Cases defined by COJ to evaluate the usability of the proposed system.

  Buyer will evaluate sandbox environment using the evaluation criteria set forth in the following table.

Sandbox Software Environment Evaluation Category	Maximum Score
Software Functionality to Meet Business Needs	40
Ease of Use of System Software	30
Self Help Access and Functionality	10
Reporting and Dashboards	10
User Workspace Configuration Abilities	10

- Based on the combined scores of the Responses, software demonstrations/oral interviews and sandbox software environment, Buyer will select the highest scoring contractor and submit for award for the "best qualified" contractor for the Grant Management Software as a Service (SaaS) Solution.

B. Before making an award, Buyer reserves the right to seek clarifications, revisions, and information it deems necessary for the proper evaluation of Responses. Failure to provide any requested clarifications, revisions or information may result in rejection of the Response.

C. Buyer reserves the right to accept or reject any and all Responses, or separable portions thereof, and to waive any minor irregularity, technicality, or omission if Buyer determines that doing so will serve Buyer's best interests. Buyer may reject any Response not submitted in the manner specified by the RFP.

2.6 <u>Award of Contract</u>.

A. The process for contract award is set forth in Jacksonville Ordinance Code Sections 126.204. Generally, Buyer will award the Contract to the responsible and responsive Contractor whose Response is determined in writing to be the most advantageous to the City of Jacksonville, based solely on the relative importance assigned to price and of the criteria set forth in Attachment B. The award may be contingent on the outcome of direct

City of Jacksonville, Florida

Lenny Curry, Mayor

Procurement Division
Ed Ball Building
214 N. Hogan Street, Suite 800
Jacksonville, Florida 32202

ONE CITY. ONE JACKSONVILLE.

March 5, 2018

817 Larch Valley Ct.
Leesburg, VA 20176

NOTIFICATION OF FORMAL BID REJECTION

BIDDER'S NAME: Dulles Technology Partners

CONTACT NAME: Tom Nyilasi

BID NUMBER: ESC-0352-18

NAME OF BID: Grant Management Software as a Service Solution

DATE OPENED: 1/31/18

REASON FOR REJECTION:
Agency recommends rejecting vendor for failure to meet the minimum requirements and to submit all addenda as stated in the specifications.

IF YOU WISH TO PROTEST THE RECOMMENDED REJECTION OF THIS BID, PLEASE RESPOND IN ACCORDANCE WITH THE CITY OF JACKSONVILLE BID PROTEST PROCEDURES. DIRECT ALL PROTEST TO THE RESPECTIVE ANALYST/BUYER, FACSIMILE NUMBER (904) 255-8837.

BUYER'S SIGNATURE: _____
Annette L. Burney

Leslie-Burney, Annette

From: Leslie-Burney, Annette
Sent: Monday, March 05, 2018 10:18 AM
To: TOM.NYILASI@DULLESTECH.COM
Cc: Nunziato, Christine
Subject: REJECTION NOTICE: ESC-0352-18 Grant Management Software as a Service Solution
Attachments: DULLES.pdf

Tom:
Please find the attached rejection letter for the above RFP. Please email me with any questions or concerns.

Thank you,

Annette L. Burney
Purchasing Analyst
Procurement Division
Finance and Administration Department
214 N. Hogan Street, Suite 800
Jacksonville, FL 32202
Ph.: 904-255-8810
Fax: 904-360-8527
Email: aburney@coj.net

*** Privacy Act: This communication may contain privileged or other official city information. If you are not the intended recipient or believe that you have received this communication in error, please reply to the sender indicating that fact and delete the copy you received. It is a violation of Federal Law to print, copy, retransmit, disseminate, or otherwise use this information.

-----Original Message-----
From: P0697@coj.net [mailto:P0697@coj.net]
Sent: Monday, March 05, 2018 10:08 AM
To: Leslie-Burney, Annette
Subject: DULLES

Please open the attached document. It was scanned and sent to you using a Xerox Multifunction Printer.

Attachment File Type: pdf, Multi-Page

Multifunction Printer Location: Ed Ball 8th Floor
Device Name: P0697

For more information on Xerox products and solutions, please visit http://www.xerox.com

CITY OF JACKSONVILLE
DIVISION OF PROCUREMENT
ED BALL BUILDING – 8TH, FLOOR
214 N. HOGAN STREET
JACKSONVILLE, FL 32202

ADDENDUM NUMBER: **THREE (3)**

BID NUMBER: **ESC-0352-18**

PROJECT NAME: **GRANT MANAGEMENT SOFTWARE AS A SERVICE SOLUTION**

OPENING TIME AND DATE: **2:00 P.M., Wednesday, January 24, 2018**

THIS ADDENDUM IS ISSUED FOR THE INFORMATION OF BIDDERS ON THE ABOVE TITLED PROJECT AND WILL BE PART OF THE CONTRACT

The purpose of this addendum is for the following:

Mandatory Pre-bid Requirement
The mandatory pre-bid conference requirement has been waived. Bidders who did not attend the meeting on-site or via conference call, or who were dropped from the conference call are now allowed to submit a response.

Response to Vendor Questions

1. Oracle and AST are confused with the City's release of the attached RFP, ESC-0352-18. A Grants Management SaaS solution is included in the RFP response to ESC-0549-16 which Oracle and AST are currently negotiating the implementation services.

Could you please provide direction on how AST and Oracle should proceed with responding to the attached RFP? Should we remove grants management from the ERP implementation?

Response: The City is interested in receiving proposals for a comprehensive grant management software solution. Although the ERP solution may overlap some functionality in a comprehensive solution, the City understands the functionality proposed in the ERP solution is more post-award tracking and management focused whereas the Grants Management RFP includes more pre-award and workflow focused functionality. Going forward, the City will determine how to address any overlap situations that may occur.

Your response should address the requirements and scope as stated in the Grant Management Software Solution RFP.

2. I would like to point out the on page 5 of the RFP you are asking for the Business Requirements Functions Response, which is Form 5, to be provided back to you in Excel format. Can you either change that requirement to WORD as well or please send form 5 in Excel so we can complete and submit accordingly.

Response: To be consistent with the instructions outlined in Section 2.4, Item #5, bidders are to respond to the Business Requirement Functions (Form 5) using the attached Excel spreadsheet.

Bidders may send written request for the Excel document to aburney@coj.net.

***Please note, as stated in Addendum # 2, forms 4-6 are still available by request. Form 5 shall now be requested in Excel format.**

3. In regards to Form 5, for business requirements that are designated as "SF", is an explanation necessary of how this is met in the system? The form states that requirements designated as "FR" and "CD" are to provide a description/identifier in the comments section, however, the form does not contain a comments section. Can you please clarify how this form is to be completed?

Response: Each contractor is responsible to respond SF, FR, CD, or DN in the space provided under the Contractor Response column. A comment section has been added to each section in the revised Form 5.

4. While it was noted that there are an anticipated 75 internal users, what is the expected number of recipient (external) users?

Response: About 150 different agencies; however this number can fluctuate annually and several users may receive multiple awards.

5. Of the 75 users, how many of the users would be considered "high usage" users?

Response: It will depend on the features the solution provides, but 30-40 people could possibly be considered potential high users.

6. Has a budget been approved for this project? If so, for how much?

Response: This project is included in the current fiscal year budget (Oct-Sept) with budgeted range of $100,000 to $150,000.

7. In addition to the high-level timeline provided in the RFP, does the City have a more specific anticipated project timeline (project kick off, go live, etc.)?

Response: No

8. In regards to formatting, Form 6 gives a 20-page limit for all requirements. Does the 20-page limit include appendices used to further explain a question?

Response: No. Appendices are not included in the 20-page limit.

9. REI Systems will call into the Pre-bid conference on January 3 and we have intentions of providing a compelling SaaS based grants management solution by January 17, 2018. However we request an amendment to section 4.3 SaaS Solution, before REI and most other SaaS vendors would be able to provide a compliant response. Our interpretation of this section currently requires that the SaaS solution provider of the grants management solution also needs to own, manage and maintain the underlying technical infrastructure including the network, servers, etc. The latest enterprise technology platforms for SaaS solutions are being provided via cloud computing platforms.

The largest most successful cloud computing companies are Amazon, Google, Microsoft and Salesforce. However the SaaS solutions that are provided on these cloud infrastructures are not provided directly by those companies but by companies that develop, manage and maintain specific business based SaaS solutions like a Grants Management Solution. If section 4.3 remains as currently worded then you will preclude vendors that are using the largest most successful and secure cloud platforms from delivering their Grants Management Solution to the City of Jacksonville. To ensure a greater level of security for your SaaS solution you could request that is be placed on a FedRAMP certified cloud that has been accepted by the US federal government for its added security standards.

Taking the above into consideration, our suggested wording for Section 4.3 SaaS solution is as follows:

4.3 SaaS Solution
The SaaS Solution must consist of the software solution (e.g. the licensed software solution and all associated modules required to meet the requirements of this RFP) and be available to all users through internet access to conduct daily business activities. The SaaS Solution must be accessible from various City client devices (desktop and mobile devices) through a thin client interface such as a current web browser and via mobile access. The SaaS Solution provider must provide the direct SaaS Solution support interface to the City and ensure any support actions needed from the underlying cloud platform is managed by the SaaS Solution provider. The cloud platform used must be FedRAMP certified, ensuring a greater level of security for the City and clients.

Response: The language stated in Section 4.3 shall be replaced with the following:

The SaaS System Solution must consist of both the software solution (e.g. the software product and all associated modules required to meet the requirements of this RFP) and the SaaS hosting services (e.g. those services that allow the City to access the software solution and conduct daily business activities). The SaaS System Solution must ascertain that the underlying technical infrastructure (network, servers, operating systems, storage, etc.) is in place (or provided) in order for the City to utilize the full capabilities of the software applications. The applications must be accessible from various City client devices (desktop and mobile devices) through a thin client interface such as a web browser and via mobile access. Additionally, The SaaS Solution provider must provide the direct SaaS Solution support interface to the City and ensure any support actions needed from the underlying cloud platform is managed by the SaaS Solution provider. The cloud platform used must be FedRAMP certified, ensuring a greater level of security for the City and clients.

10. I was reviewing bid ESC-0352-18 for a Grant Management Software as a Service Solution, and our company is interested in responding, but we wanted to be clear on one thing first. We have a SaaS solution and lots of experience that deals with grant software on the receiving end. Is the system that you are looking for meant to handle the grantee or the grantor side?

Response: Both

11. Would it be possible to get the RFP document in a Word format or some other format where we can cut and paste from the document? The pdf you sent us is made of images and we cannot cut and paste from the document.

Response: Forms 4 & 6 are available in Word format via written request to aburney@coj.net.

12. For pricing, will pricing be evaluated on first-year costs, total three-year term costs, or some other time frame?

Response: Vendor should complete Form 1 in its entirety. This includes a breakdown of costs per year for years 1-3 (years 4 & 5 are optional) and a total three years term cost.

DATE: January 17, 2018 **Analyst: Annette Burney**

RECEIPT ACKNOWLEDGED BY RETURN OF SIGNED COPY WITH BID.

_____
Bidder's Signature

_____
Title

_____
Company

_____
Date

SF (SF) Standard Function in Current Release
FR (FR) Designed in Future Release
CD (CD) Customer Development Required
DN (DN) Does Not Meet Requirement

Number	Business Functions/ Description	Priority	Contractor Response	Comments
	Manage Funds (BR1)			
MF1	**Security**			
MF1.1	Control security to business functions based on role definitions	1		
MF1.2	Centralize administration of core Grant Administration configurations to a System Administration role in order to standardize Grant Management city wide. This role would establish Security Roles, standardize financial reporting requirements, determine grant procedures (establish work flow rules), standardize the creation of income source (Grantor) set up, standardize creation of award payment procedures (Grantee), etc.	1		
MF1.3	Assign Grant Administrators to specific funds and restrict access to fund updates to the Grant Administrator role	1		
MF1.4	Allow backup roles for Grant Administrator as needed (Vacation, etc.)	1		
MF2	**Manage Funds**			
MF2.1	Track fund balances	1		
MF2.2	Associate and Track Income Sources and amounts to funds	1		
MF2.3	Track Income Sources by type (Grants, Organizations, etc.)	1		
MF2.4	Define Groups and associate funds to groups (such as PSG, Misc. Appropriations, etc.) for dashboard and reporting purposes	1		
MF2.5	Prevent grants from being awarded in excess of the sourced Fund amount	1		
MF2.6	Ensure grants are not awarded until funds have been approved and sourced.	1		
MF2.7	Ensure grants are not awarded after defined close deadlines for the fund	1		
MF3	**Manage Opportunities1**			
MF3.1	Define multiple Opportunities within a specific fund in order to do competitive grant awards for like providers.	1		
MF3.2	Set maximum amounts for grant awards by opportunity and enforce this when submitting applications	1		
MF3.3	Define and standardize Applications by Opportunity Category	1		
MF3.4	Notify potential applicants of Grant Opportunities and procedures for applying	1		
MF3.5	Associate Ordinances, Federal Opportunity numbers and other information to the fund sources for auditing purposes	1		
MF3.6	View history of fund distribution, opportunities and awards for trends, comparison and reporting purposes	1		
MF3.7	Enforce deadlines for applications, performance submission, etc.	1		
MF4	**Manage Applicants**			
MF4.1	Ability to Customize Grant Application Forms	1		
MF4.2	Ability to customize and automate routing of opportunities, applications, awards, etc for approval, scoring, rejecting, additional information, etc.	1		
MF4.3	Define and Manage eligible Grant Applicants	1		
MF4.4	Comply with and enforce Grant standards and Not for Profit designations such as Uniform Grants Guidance, DATA Act, IRS regulations, etc.	1		
MF4.5	Define standardized budget line items for comparing applicant financial information	1		
MF5	**Data Retention**			

MF5.1	COJ must own rights to the data in accordance with Florida Sunshine Law	1		
	Apply for Grants - Grantor (BR2)			
MA1	**Manage Applications**			
MA1.1	Notify of grant availability via web page	1		
MA1.2	Apply for grants via internet	1		
MA1.3	Standardize grant applications for scoring comparisons	1		
MA1.4	Attach documentation to Grant Applications	1		
MA1.5	Grant Applicants can self-register, create user IDs and passwords for submitting Applications	1		
MA1.6	Monitor compliance with Application deadlines and availability windows	1		
MA1.7	Allow potential applicants to subscribe to grant notification emails	1		
MA1.8	User friendly, intuitive application process that does not require training	1		
MA1.9	Provide Online training videos for Grant Application Process	1		
MA1.10	Uniquely identify and verify Applicants via Organization information (Tax ID, etc.)	1		
MA1.11	System verification that an application is complete before it can be submitted	1		
MA1.12	Track Applications by Opportunity	1		
MA1.13	Provide workflow for routing and tracking applications by status	1		
MA1.14	Ability for applicant to withdraw an Application	1		
MA1.15	Ability for applicant to amend an Application	1		
MA1.16	Ability to notify applicant of Application status	1		
MA1.17	Ability to save uncompleted application information for completing and submitting at a later time	1		
MA1.18	Ability for Grant Administrator to view applications in progress	1		
MA2	**Manage Organizational Accounts**			
MA2.1	Ability of applicants to create organizational profiles /accounts.	1		
MA2.2	Ability for applicants to prepopulate applications with information from their organizational account.	1		
MA2.3	Ability for applicants to store frequently requested documents in their organizational account to be included in applications	1		
MA3	**Manage Feedback**			
MA3.1	Ability for Grant Administrator to comment on applications in process, and submitted.	1		
MA3.2	Application's comments are posted next to the section or document that the comment references as opposed to collectively at the beginning or end of the application.	1		
	Score and Review Applications (BR3)			
SR1	**Score Applications**			
SR1.1	Ability to assign 3rd party scorers	1		
SR1.2	Ability to route applications to proper scoring queue automatically	1		
SR1.3	Ability to assign Scorers and Reviewers to specific grant opportunities	1		
SR1.4	Ability to have a combination of both internal and external scorers for the same Grant Opportunity	1		
SR1.5	Ability to define and enforce scoring windows	1		
SR1.6	Ability to automatically route application through the scoring process based on status	1		

SR1.7	Ability to route parts of an application to different individuals for scoring specific to those sections.	1		
SR1.8	Ability to create score sheets specific to certain portions of the application.	1		
SR2	**Evaluate Scoring**			
SR2.1	Ability to define Outlier Score criteria for exclusion from comparisons	1		
SR2.2	Ability to exclude Outlier Scores from comparison criteria	1		
SR2.3	Ability to download scores to excel	1		
SR2.4	Ability to rank and compare applicants by score	1		
SR2.5	Ability to easily format and reformat reports	1		
SR3	**Notify of Scores**			
SR3.1	Ability to close out applications from further scoring	1		
SR3.2	Ability for Scorer to notify Grant Administrator that scoring is complete	1		
SR3.3	Ability to automatically notify Applicants of scoring status	1		
SR3.4	Ability to notify Scorers of Applications of their status throughout the scoring cycle	1		
	Award Grant to Applicant (BR4)			
AG1	**Award Notification**			
AG1.1	Ability to auto notify of award or decline	1		
AG1.2	Ability to customize the Award notification letter to Applicants	1		
AG1.3	Ability to batch print all existing applications and scoring sheets	1		
AG1.4	Prevent Awards from being granted over the amount of the maximum Award	1		
AG2	**Contract Management**			
AG2.1	Ability to track compliance with contract terms (including insurance certificates)	1		
AG2.2	Ability to customize and auto generate contracts upon Award Notification	2		
AG2.3	Ability to legally authorize an on-line contract and route for signatures	2		
AG2.4	Ability to prevent payments until contract has been signed	1		
AG2.5	Ability to prevent payments when contract is in non-compliance status	1		
	Manage Performance and Payment (BR5)			
MP1	**Submit Financial Information**			
MP1.1	Auto notify Grantee of reporting requirements	2		
MP1.2	Provide alerts, reminders of due dates	1		
MP1.3	Intuitive workflow of required information	1		
MP1.4	Ability for Grantee to customize information they need to track within their own organization	2		
MP1.5	Ability for Grantor to view Grantee Performance Information	1		
MP1.6	Ability for Grantee to auto notify Grant Administrator when Performance Information has been submitted	1		
MP1.7	Ability to require Grantee financial information to be submitted in format required by Grantor.	1		
MP1.8	Ability to assign priorities to performance goals	1		

MP1.9	Ability to attach backup to expenses and submit with financial information	1		
MP1.10	Ability to submit all performance information electronically	1		
MP1.11	Ability for Grantor to customize frequency for submitting performance information	1		
MP1.12	Ability for Grant Administrator to change Grantee Grant Manager	1		
MP1.13	Ability for Grantee to amend Performance or Budget Information	1		
MP1.14	Ability for Grantee Grant Manager to maintain security roles for their staff	1		
MP1.15	Prevents Grantee Budget amount from being more than Grant Amount	1		
MP1.16	Ability to enter a negative expense amount on a grant expense line	1		
MP2	**Review Financial Information**			
MP2.1	Provide User friendly, parameter driven reports (monthly, quarterly, annually)	1		
MP2.2	Provide benchmarking data for like categories in order to assist with evaluation of financial reports	1		
MP3	**Pay Grantees**			
MP3.1	Ability of Grant Administrator to View and drill-down into Grantee Budget and Performance submission in order to approve payment	1		
MP3.2	Ability for Grant Administrator to Approve payments on-line	1		
MP3.3	Ability for Payment Requests to be automatically generated after Grant Administrator Approval	1		
MP3.4	Ability for Grant Administrator and Grantee to track payment requests and payments on-line	1		
MP3.5	Ability to interface Payment Requests to AP ERP system	1		
MP3.6	Ability for Grant Administrator to auto notify Grantee of approval, un-approval, additional information required on expense submissions	1		
MP3.7	Ability to amend Fund Amounts after Grant Award	1		
MP3.8	Ability to track Contract changes needed when Fund Amounts are changed	1		
MP3.9	Ability to track Budget changes needed when Fund Amounts are changed	1		
MP3.10	Ability to submit and track payment for additional expenses after original deadline	1		
MP3.11	Ability to Notify AP to stop payment on an Expense Reimbursement Request	1		
MP3.12	Ability for Grant Administrator to request and track reimbursement requests from Grantees	1		
MP4	**Budget Corrections**			
MP4.1	Ability for applicants to reclassify or correct expense amounts from prior expense periods and show transactional amount for audit purposes.	1		
	Research Grants (BR6)			
RS1	**Research Grants**			
RS1.1	Ability to Search by Grant application deadlines	2		
RS1.2	Ability to Search by standardized Grant Categories	2		
RS1.3	Ability to Search by standardized Grant Eligibility	2		
RS1.4	Ability to Search by Grant Location	2		
RS1.5	Ability to Search by Funder Type	2		
RS1.6	Ability to Search by multiple search criteria in one search	2		
RS1.7	Ability to save Search Criteria	2		
RS1.8	Ability to be auto-notified of new grants meeting saved Search Criteria	2		
RS1.9	Ability to share saved grants across the organization	2		

RS1.10	Ability to add Search/Filter Criteria information to existing Grants (such as available locations, CFDA number, etc.)	2		
RS1.11	Ability to Search by CFDA number	2		
RS1.12	Ability to Route Grants throughout the Organization for collaboration and research purposes	1		
RS1.13	Ability to Determine Status of a Grant as it is researched and routed throughout the Organization	1		
RS1.14	Notify Grant Researchers that a Grant is already under evaluation within the organization	1		
RS1.15	Ability to Define Workflow for Grant Evaluation process	1		
RS1.16	Notify Grant Researchers that a Grant has already been researched and determined to not be applicable for the Organization	1		
RS1.17	Ability to Import/Input Grants found in other searches from other sources into Grant Search repository	1		
	Apply for Grants - Grantee (BR7)			
GA1	Research Grants			
GA1.1	Store Links for Grant Application websites by Funder Type	2		
GA1.2	Ability to prepopulate Grant Information from Form Templates	2		
GA1.3	Ability to Submit Grant Applications on-line to Funding Organization	2		
GA1.4	Ability to Store Grant Applications with Grant Search Results	1		
GA1.5	Ability to Track history of Grant Applications, Awards and Amounts	1		
GA1.6	Ability to Track history of Grant Applications and Success Rates by Department, Funder, other User Defined parameters	1		
GA1.7	Ability to be notified of date sensitive parameters (Grant Application date, Performance and Financial due dates, etc.)	1		
GA1.8	Ability to assign a backup for Grant Applicant tasks	1		
GA1.9	Ability to escalate potential missed deadlines	1		
GA2	Track Payments			
GA2.1	Ability to Interface Grant Receivable and Payment information to/from ERP system	2		
GA3	Grant Reporting			
GA3.1	Ability to store Grant Reporting Requirements with Grant	1		
GA3.2	Ability to prepopulate Grant Reporting Information from ERP System	1		
GA3.3	Ability to easily create Grant Reporting Templates and Reports	1		
GA3.4	Ability to track budget against actuals for Grant Reporting	1		
GA3.5	Ability to track actual Performance against budget for Grant Reporting purposes	1		
GA3.6	Ability to measure and track cost of Outcomes	1		
GA3.7	Ability to track variance between budgeted Outcome costs and actual Outcome costs	1		
GA3.8	Ability to submit Grant Reports on-line to Funding Source	2		
GA3.9	Ability to assign separate security roles for Financial and Operational Managers	1		
GA3.10	Supports drill-down reporting to view underlying details of Budget, Actual and Variances	1		
GA3.11	Roll up multiple grant budget and performance activity into one project	1		
GA3.12	Maintain auditable trail of all system activity with date, time and user ID	1		
GA3.13	Ability to search and filter to find grants, documents or communications within the system	1		
GA3.14	Ability to attach documents, email to Grants	1		

GA4	**Track Tasks**			
GA25	Calendar function to track deadlines, tasks and assignments	1		
GA26	Track staff time	2		
	Centralized Administration of Funds and Grants (BR8)			
CA1	**Consolidated Reporting**			
CA1.1	User friendly ability for end user to create and save their own reports	1		
CA1.2	Ability to create pivot table/BI reports to "slice and dice" data using standard Excel functionality	1		
CA1.3	Ability to graph data using standardized Excel functionality	1		
CA1.4	Ability to drill down from summarized data into detail	1		
CA1.5	Ability to create exception reporting/alerts that is triggered whenever the exception criteria is encountered	1		
CA1.6	Ability to schedule reports to run automatically on a predetermined basis	2		
CA1.7	Ability to export reports to Excel and use standardized Excel sorting and filtering capabilities	1		
CA1.8	Ability to access all fields in the database through on demand Reporting by end user	1		
CA1.9	Ability to customize end user portal view to only see information relevant to their job duties	1		
CA1.10	Ability to view Award information by Geographic Location (Zip code, City, State)	1		
CA1.11	Ability to group Geographic Locations into Regions for reporting purposes	1		
CA1.12	Ability to Report by responsible areas within the Organization (Department, Division, etc.)	1		
CA1.13	Ability to reflect Financial rollups and responsibilities within the ERP G/L system	2		
CA1.14	Ability to import data from external systems (such as ERP G/L system) into Reporting Tool	1		
CA2	**External Reporting**			
CA2.1	Provide automation and scheduling of External Reporting requirements, prepopulating data and interfacing with required external financial data from ERP	2		
CA2.2	Provide PDF copies of issued reports for storing with applicable grants	1		
CA2.3	Provide Calendar view and alerts for all external reporting requirements	1		
CA2.4	Provide reporting templates and links for all requirement reporting for Funding Source	1		
CA2.5	Provide ability to publish reports/dashboards for viewing by public	1		
CA3	**Data Mart**			
CA3.1	Ability for end user to report and export data from Data Mart using ODBC and other standard connections	1		
CA4	**Dashboards**			
CA4.1	Provide out of box Dashboard views that enable end users to define and view summarized data by priorities, fund, department, grant, opportunity, geography, budget variances, exceptions, disbursement amounts, etc.	1		
CA4.2	Ability to drill down from summarized data to detail data in graphical format	1		
CA4.3	Ability to view exception information that requires immediate response via dashboards (potential missed deadlines, funding shortfalls, etc.)	1		

CITY OF JACKSONVILLE
DIVISION OF PROCUREMENT
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ADDENDUM NUMBER:	**FOUR (4)**
BID NUMBER:	**ESC-0352-18**
PROJECT NAME:	**GRANT MANAGEMENT SOFTWARE AS A SERVICE SOLUTION**
OPENING TIME AND DATE:	**2:00 P.M., Wednesday, January 24, 2018**

THIS ADDENDUM IS ISSUED FOR THE INFORMATION OF BIDDERS ON THE ABOVE TITLED PROJECT AND WILL BE PART OF THE CONTRACT

The purpose of this addendum is in response to the following vendor questions:

1. What is the City of Jacksonville's anticipated timeline for holding finalist presentations, sandbox evaluation time period, and selection of vendors?

   Response: Demos will begin in mid-February. The sandbox period will immediately follow a vendors demo, and be prior to the next demo taking place. The number of demos will dictate when selection is made.

2. How many City of Jacksonville departments have and are using AmpliFund today for grants management?

   Response: Two, the Office of Grants and Contract Compliance and the Housing and Community Development Division.

3. What are these departments current challenges with using AmpliFund for grants management?

   Response: No specific challenges have been identified.

4. How many separate grants management programs, forms, and workflows does the City of Jacksonville have today?

   Response: The City has at least 6 different grant programs with various forms and workflows. The workflows the City wishes to have a solution to are outlined in the Business Requirements.

5. What are the top 3 goals/objectives for the new grants management system?

   Response: Please see the Sec. 4.1.

6. Can you please clarify the grant expenditures dollar amount $63 M on p. 29 vs. $67M on p. 45 the pricing sheet? What is the breakdown of grant dollars received vs. grant dollars distributed?

Response: The Pricing Sheet is incorrect. The correct total amount of grant expenditures is $63,184,239 as listed in Sec 4.2 on page 29.

7. Does the City of Jacksonville utilize external reviewers in its grantmaking?

   Response: Yes. In some but not all grant making programs.

8. What financial system does the City of Jacksonville use to manage funds? Is an integration with the grants management system needed with this system?

   Response: Our current financial system is FAMIS. We are in negotiations to begin using Oracle. Yes, integration is needed with the new system.

9. Can the City of Jacksonville please provide sample reports of the types of reports it produces today?

   Response: The City produces few reports and is looking to add/improve the limited capability we currently have.

10. How many estimated administrative staff would use the system?

    Response: We estimate 75 users of various functions.

11. Approximately how many staff members would access the system less then 2 hours per month?

    Response: This information is not available at this time.

12. Approximately how many staff members would only use the reporting module of the system?

    Response: This information is not available at this time.

13. How many staff members do you estimate would use the system over 40 hours per month? Less then 40 hours per month?

    Response: This information is not available at this time.

14. What system is being used?

    Response: Most agencies are doing this manually, but there is one agency using SAMIS and another one that uses Amplifund.

15. Is a data migration required?

    Response: No

16. Which AP ERP system is used?

    Response: FAMIS

17. Can we obtain business process diagrams showing the end-to-end processes (for each granting program) to be automated by the system?

    Response: Please refer to the functionality in the Business Requirements. We do not have process diagrams for all end-to-end processes.

18. Please provide samples of the reports to be required.

    Response: The City produces few reports and is looking to add/improve the limited capability we currently have.

19. Are all 12 client references a requirement for Form 4?

    Response: No, please see Sec. 1.4.2 for additional details.

20. Please clarify question MF3.1 in Form 5: Business Requirement Functions Response "Define multiple Opportunities within a specific fund in order to do competitive grant awards for like providers." Please provide a specific example to support your clarification.

    Response: The system must be able to identify/specify multiple grant programs/ opportunities within the same fund of money.

DATE: January 21, 2018 **Analyst: Annette Burney**

RECEIPT ACKNOWLEDGED BY RETURN OF SIGNED COPY WITH BID.

_____
Bidder's Signature

_____
Title

_____
Company

_____
Date

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ADDENDUM NUMBER:	**FIVE (5)**
BID NUMBER:	**ESC-0352-18**
PROJECT NAME:	**GRANT MANAGEMENT SOFTWARE AS A SERVICE SOLUTION**
OPENING TIME AND DATE:	**2:00 P.M., Wednesday, January 24, 2018**

THIS ADDENDUM IS ISSUED FOR THE INFORMATION OF BIDDERS ON THE ABOVE TITLED PROJECT AND WILL BE PART OF THE CONTRACT

The purpose of this addendum is to extend the response due date to:

Wednesday, January 31, 2018 at 2:00 p.m.

***There are additional questions pending, and will be addressed in a forthcoming addendum.**

Please note: The deadline for questions has expired. No additional questions will be accepted.

DATE: **January 23, 2018** **Analyst:** **Annette Burney**

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ADDENDUM NUMBER: **SIX (6)**

BID NUMBER: **ESC-0352-18**

PROJECT NAME: **GRANT MANAGEMENT SOFTWARE AS A SERVICE SOLUTION**

OPENING TIME AND DATE: **2:00 P.M., Wednesday, January 31, 2018**

THIS ADDENDUM IS ISSUED FOR THE INFORMATION OF BIDDERS ON THE ABOVE TITLED PROJECT AND WILL BE PART OF THE CONTRACT

The purpose of this addendum is in response to the following vendor questions:

1. Related to CA3.1 is OData acceptable (vs. ODBC)?

   Response: Yes, OData is acceptable.

2. Will they require private cloud?

   Response: No, a private cloud is not required.

DATE: **January 24, 2018** **Analyst:** **Annette Burney**

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_____
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Title

_____
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