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 of award to the highest scoring bidder, SmartSimple Software, Ltd., as a result of negotiations and the terms and conditions outlined in the attached Project Implementation Statement of Work for the development and implementation of a Grant Management Software as a Service Solution. Period of service is for three (3) years from date of contract execution with two (2) one (1) year renewal options in an expenditure amount not to exceed $148,302.00.

Funding Source: AFIT53A-06522-ITEF01-03 - $70,000.00; AFIT53A-06431-ITREF01-03 - $20,000.00; AFIT53CSCS-03118 - $58,302.00

Attachments: Recommendation Memo, Tabulation and Scoring Sheets, Statement of Work and Evaluation Criteria

ANALYST: _____ **RESPECTFULLY SUBMITTED** _____
Annette Burney
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 _____

INFORMATION TECHNOLOGIES DIVISION

CITY OF JACKSONVILLE

August 30, 2018

08/30/18 11:56:22
Procurement Division

TO: Greg Pease, Chief of Procurement Division

FROM: Michael Turner, PMO Manager
Information Technologies Division

JSP 8/29/18

THRU: Kenneth Lathrop, Chief of Information Technologies/CIO

SUBJECT: Request for Award for ESC-0352-18 Grant Management Software as a Service (SaaS) Solution

On January 31, 2018, the City of Jacksonville's Procurement Division received six (6) vendor bid proposals for ESC-0352-18. Of these six proposals, five (5) were determined valid and were evaluated and scored. On March 8, 2018 CSPEC authorized Information Technologies Division (ITD) and the Office of Grants and Contract Compliance to proceed with demonstrations and sandbox evaluations on the four (4) highest scoring vendors.

On May 24, 2018, CSPEC authorized ITD and Grants to proceed with contract negotiations with the highest scoring vendor, SmartSimple Software. Contract negotiations have been completed with SmartSimple Software, resulting in the development of a Statement of Work with the vendor and the ITD and Grants evaluation team.

The Information Technologies Division (ITD) in conjunction with the Office of Grants and Contract Compliance request approval to award SmartSimple Software for ESC-0352-18 Grant Management Software as a Service (SaaS) Solution.

Funding Source	AFIT53A – ITEF01 – 03 – 06522	AFIT53A – ITEF01 – 03 – 06431	AFIT531CSCS – 03118
Description	ITD System Development	ITD System Development	Software Hosting Services
Amount	$70,000	$20,000	$58,302
Total Amount	$148,302		

Support Documents Attached:

- SmartSimple Project Implementation Statement of Work

Your favorable consideration of this request is appreciated.

CC: Damian Cook, Grant Administrator
Kristen Hill, Grant Compliance Officer
Robert Hutchens, Senior Project Manager
Tom Ossi, Technology Contract and Records Manager

smartsimple Implementation Project Statement of Work

This Statement of Work ("SOW") is subject to the terms and conditions agreed between SmartSimple Software and City of Jacksonville ("Client").

This SOW will become part of the legally binding Contract between the CoJ ("Client") and SmartSimple.

Project Name	City of Jacksonville GMS360° Implementation
Document Version	1.9
SmartSimple Account Executive	Todd Lapin
Client Project Manager	Kristen Hill
Client Executive Sponsor	Damian Cook
SmartSimple Project Manager	Raul Zapanta
SmartSimple Executive Sponsor	Cameron McLean
Related Statements of Work	None

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1 Organization Background

The City of Jacksonville Office of Grants and Contract Compliance ("City") requires a full life-cycle Grants Management Software as a Service (SaaS) Solution. The solution should equip leadership with the tools necessary to provide strategic alignment, effective organizational collaboration, additional internal controls, and improved decision making, thus contributing to organizational efficiency and effectiveness. This solution must include pre-grant award and post-grant award capabilities, and the ability to manage sub-recipients through a portal or similar capability.

2 Project Summary and Objectives

The City of Jacksonville project scope includes the replacement of the City's current grants management system, as defined by the City's requirements set forth in RFP ESC-0352-18. SmartSimple will provide all services required to implement the software applications and packages identified in Form 5—Business Requirement Functions Response, and Form 6—Technical Requirements..

The process configured will assist in the following mechanisms:

- A nonprofit profile/account to store basic organizational data
- On Line Applications
- Support multiple applications and deadlines
- Reviews
- Email notifications and communications tracking
- Easily printable applications
- Report Schedules
- Grant Performance and Financial reports
- Reporting tools
- Program Management
- Budget Management
- User Friendly Interface

COJ is seeking to implement a Grant Management System with a more comprehensive application that provides the following outcomes:

- **Stability** – Reduce system downtime and improve productivity.
- **Simplicity** – Reduce the complexity of current processes, workflows, and reporting.
- **Consolidation** – Decrease the total number of systems needed to manage grants, contracts, budgets, payments, and outcomes.
- **Enhancements** – Improve ability to capture new data points, such as outcomes, and provide actionable analytics on grants, programs and outcomes. These outcomes will result from not only the implementation of a new Grant Management System, but also through data and process refinement.

3 Key Stakeholders

Although not formal signees of this document, the following stakeholders will be engaged to review all or some of this document:

3.1 SmartSimple

Role	Responsibility
System Architect	Responsible for the overall architecture of the system as reflected in this document.
Project Manager	Review of full document, focus on Milestones and Fees
Account Manager	General review.
Executive Sponsor	General review and fees.
Business Analyst - Lead	Configuration team
Business Analyst - Second	Configuration team
Development Team	Review of Integration, Data Import, any custom configuration/scripting requirements, and any specifications that rely on new features/enhancements that are not yet in production

3.2 Client

Role	Responsibility
Grants Team	Responsible for the programmatic implementation and on-going use and administration of the system Assignee : Damian Cook, Kristen Hill
IT/Information Systems	Signs off on ITD related approvals and written notices. System configuration and technical support for City of Jacksonville Assignee: Richard Reilly, Paul Freeman (System Integrations and basic support)
Legal/Compliance	Provides legal guidance and oversight pertaining to contractual obligations, Sunshine laws, and other matters regarding federal, state, and local law. Assignee: OGC
Finance/Accounting	Ensure budgetary resources are available for project implementation and on-going use of the system. Assignee John Proctor

Branding/Marketing	Ensures COJ interface of the SmartSimple platform reflects the City of Jacksonville's branding and marketing guidelines. Assignee: Office of Public Affairs
Executive	Responsible for providing approvals for change of scope or other actions requiring formal acknowledgment and verification through written notices. Assignee: Ken Lathrop, Damian Cook
Third Parties	City of Jacksonville customers/external users of the SmartSimple system Assignee: Various applicants and recipients of COJ grant funds.

4 Security Standards

SmartSimple employs role based system access.

Each user (internal and external) logs in from the same page and based on their given role(s) are presented with the configured view of the system. These roles control the functionality available to the users.

The level of access (no access, view access or edit access) for internal staff or applicants to each component (applications, reviews, reports, etc.) and/or on a field specific level will be controlled by roles, as specified by Client.

Internal Users: Client staff, Program Administrators.

External Users: Applicants, Reviewers

Internal Staff has an elevated level of system access. They can add, view and/or update all external contacts, organizations, contracts, contracts and contract based activities.

4.1 General System Security

All information encrypted in motion (i.e. when being transmitted) using SSL and at rest (i.e. on server hard drive).

SmartSimple holds a SOC 2 Type 2 .certification.

5 Functional Quality Assurance

SmartSimple has a rigorous quality assurance (QA) testing process for all the functional processes configured in the system before being delivered to Client. This type of QA testing is in addition to the QA testing that occurs before each platform upgrade, which encompasses baseline changes to the platform.

The following procedures are followed before releasing a component to Client, once the implementation team completes a component.

- Once the component has been implemented then the QA team will test the component by following all possible use cases.
- Following the testing, the QA team will provide their feedback to the implementation team and any issues that are found will be addressed.
- After all issues have been addressed, then the implementation team will demo to Client the functionality in the component and provide a set of instructions to test the various use cases.

6 User Experience Testing

SmartSimple has a process in place for testing the end user experience. This testing is unique to every system as all user roles and all business processes are tested to ensure a smooth and intuitive user experience.

The following procedures are followed before releasing a component to Client, once the implementation team completes a component.

- Once the component has been implemented then the User Experience team will test the system by logging in as the end user for all applicable roles and go through all the business processes. This is to ensure that the end user functions are intuitive and clear instructions are available for the same.
- Following the testing, the User Experience team will provide their feedback to the implementation team and any issues identified will be addressed.

7 User Acceptance Testing (UAT)

Once Client has been provided with the instructions for testing they need to follow those instructions, test and confirm that all the business processes have been accurately captured in the system.

The testing is to ensure the system performs according to the specifications outlined in this Statement of Work and in accordance with refinements to these specifications agreed upon during the implementation.

Important: changes to specifications during the UAT phase are out of scope and will result in additional costs and likely delays to the project schedule.

7.1 Test Scripts

Client will need to create test scripts. For each milestone, the Client will have the opportunity to create their own test scripts on the following activities:

a) Weekly requirements review meeting where demos may be included as an agenda item. The demo, when applicable, will provide the Client to see some of the features that have been configured to date.
b) Pre-release Demo meeting. This meeting occurs one week before the UAT Demo Release.
c) UAT Demo Release meeting.

These demos are recorded to allow the Client to view it any time.

SmartSimple can also provide some test script template as a sample.

7.2 Stakeholder engagement

Client is encouraged to engage a focus group or groups of their relevant stakeholders.

7.3 Task Tracker

SmartSimple provides an application called Task Tracker with each system. This application is to be used by both Client and the implementation team to raise any tasks and provide feedback during the implementation and UAT process.

8 Important Notes about Scope

The scope of the project is limited to the items outlined in this Statement of Work, including the supporting documents referenced in Section 9 below, including *SmartSimple_Sofware_Original_Response_to_ESC-0352-18.pdf.* These additional supporting documents were provided by COJ.

Details of process flow and templates such as forms, activities and reports are expected to be as previously described and in materials provided by Client.

8.1 Data Import

The historical data will be imported once, at the very start of the configuration for this project. Client must provide a spreadsheet with the data for this import. It can contain a subset of the data if desired, but the structure of the spreadsheet must be identical to that of the final import. Prior to go-live all imported and test data will be deleted from the system, and the final data will be imported from the final spreadsheet provided by Client.
Client is responsible for all data cleansing and validation.
NOTE: Once imported, these grants will not behave in the same way as grants created within SmartSimple, as outlined in this System Specifications Document. They will be imported as static records. In developing the new system, it is expected that Client's requirements for the data being captured will include new fields, not present in their existing system, as well as for newly structured data. SmartSimple will map existing data being imported into the new structure, based on Client instructions. There are implications to the behavior of imported records where the data is not present, or structured differently. For example, if Client adds a new coding field and makes it mandatory, imported grants that do not have that field may require manual intervention by Client staff to populate the field in order to progress the record (i.e. if the coding is required to make a payment).

8.2 Integration

SmartSimple will integrate with the following systems:

- ERP (Oracle) – bi-directional
- SAMIS – bi-directional
- USASPENDING.gov
    - The system will allow custom award data from USASPENDING.gov to be uploaded into SmartSimple to make it searchable.
    - The data file to be uploaded will be prepared by COJ staff by downloading it in the .csv format from the USASPENDING.gov website.
    - The staff will then upload this file using a url generated in SmartSimple. The system will give COJ the ability to upload and process the file in SmartSimple using the Autoloader feature so that records can be created from the data in the

file. Once the records are created in the system, the data will be searchable in SmartSimple.

- A sample file of the data to be uploaded is provided as *'All Federal Grants – Florida.csv'*

8.3 Change Requests

Significant changes to scope or timelines, will be subject to additional costs. A formal change request, signed by both parties, outlining the changes and the impact to cost and schedule will be required to proceed.

Changes to the system configuration, above and beyond those previously agreed to and signed off on in the Statement of Work, can potentially be identified during deployment and impact effort, cost, duration or the go-live date.

- Scope change means any change from the previously defined specifications.
- Any project change will be discussed and negotiated between COJ and SmartSimple on whether or not it's a "change in scope of the deployment."
- When a scope change is encountered, all work on that part of the project may cease until the client determines if the identified change is mandatory within the project.
- Clients may opt to defer the change until after the current project or elect to use an alternative approach within the system.
- If the change in scope is fundamental to the entire deployment project, then escalation to the Executive Sponsors is always required. In some instances, the project may need to be placed on hold until such time as the client determines how they wish to proceed.
- Timely decision making is required in order to ensure that the project does not lose its deployment window and therefore require rescheduling. If the project is delayed, the client will be billed for all work up to the point of project suspension.

9 References

ESC-0352-18.pdf and all applicable addendums

SmartSimple_Sofware_Original_Response_to_ESC-0352-18.pdf

Grant_Process_Detail_Workflow.pdf – This master document covers the entire COJ Granting Process in detail with every process outlined using a swim lane diagram.

The sub processes described in these diagrams outline the different stages in the granting process such as application submission, application review by external scorers followed by the COJ decision on the application. The Post Award section contains the swim lane diagrams for the Financial and Performance reporting. The document contains separate diagrams for common alternate scenarios encountered in the above sub processes.

Documents below have been provided as examples of documentation, and adjustments can be made within the established/agreed upon RFP and SOW.

Supporting documents provided to clarify the application and budget templates mentioned in the swim lane diagrams are as follows -

- *Application form template: 2017 -2018 Universal application.pdf*
- *Application form template: 2019 Public Service Grant Applicationrev5.doc*
- *Application form template: UA 2018-2019 online application – CDBG.pdf*
- *Budget form template: PSG Audit Expense Acceptable Format rev.pdf*
- *Award Grant – Legislation: Legislative Process Document.pdf*

Supporting documents provided to clarify post award reporting requirements are as follows –

- *Example Annual Financial Report.pdf*
- *Example of Payment Request.pdf*
- *Example of Performance Variance Report – I M Sulzabacher - Meals 16-04.pdf*
- *Goals and Objectives Worksheet FY18.xlsx*

10 What is Out of Scope for this Project

Anything not explicitly included is out-of-scope, including the following:

- Customized user guides, manuals, process flow diagrams or other documentation, however the following documents can be generated from the system:

  System design summary including all objects, all fields, all automation tasks

  System security summary including platform security settings with expanded details and a flag if attention is required

  Organization contact security matrix including list of settings that allow or deny organization and contacts interact with other organization and contact data.

  System feature and visibility permissions.

- In addition, system can generate diagrams summarizing modules specific configuration and workflow configuration. Complex or highly formatted reports. This includes any reports that require functionality that is outside standard platform capability.
- Translation of the interface to other languages.
- Extensive formatting of instructions, validation criteria or tool tips using scripts or formatting other than supported by base functionality.

11 Milestone Dates and Acceptance Criteria

11.1 Milestone Schedule Validity

Milestone dates herein assume approval by both parties on or before **November 8, 2018**.

The schedule is tentative and will be finalize once the contract is executed.

If approval occurs after that date, a new project plan with revised milestone dates will be provided within five working days of the approval date.

11.2 Milestone Schedule

Milestone # 1	
Name:	Project start / Kickoff meeting

Deliverable(s):	SOW review, milestone schedule, roles and responsibilities, and meeting schedule.
Due Date(s):	November 8, 2018
Milestone # 2	
Name:	Training for Project Team
Deliverable(s):	SmartSimple Basics (general navigation) and Customer Relationship Management (CRM).
Due Date(s):	Two - 2 hour sessions before the UAT demo release of Milestone # 3.
Milestone # 3	
Name:	Baseline system and CRM configuration
Deliverable(s):	Organization profile, Contact profile, Applicant registration page, Login page, Initial historical data import
Due Date(s):	UAT demo release: November 27, 2018 UAT: Nov 28 – Dec 4, 2018 (COJ) UAT feedback remediation and testing 1: Dec 5 - 7 (SmartSimple) UAT of remediation: Dec 10 – Dec 11 (COJ) UAT feedback remediation and testing 2: Dec 12 (SmartSimple) UAT of remediation and Sign-off: Dec 13 (COJ)
Milestone # 4	
Name:	Create Fund and Opportunity
Deliverable(s):	Ability for staff to create a Fund and Opportunity and publish to applicant portal – Program Manager UTA, Fund Manager UTA
Grant Detail Process Workflow Section(s):	1.0
Due Date(s):	UAT demo release: January 28, 2019 UAT: Jan 29, 2019 – Feb 4, 2019 (COJ) UAT feedback remediation and testing 1: Feb 5 - 7 (SmartSimple) UAT of remediation: Feb 8 - 11 (COJ) UAT feedback remediation and testing 2: Feb 12 (SmartSimple) UAT of remediation and Sign-off: Feb 13, 2019 (COJ)
Milestone # 5	
Name:	Pre-Award Application Submission
Deliverable(s):	Ability for applicants to complete and submit applications to COJ 3 application types.
Grant Detail Process Workflow Section(s):	2.0,6.0

Due Date(s):	UAT demo release: April 24, 2019 UAT: April 25 – May 1, 2019 (COJ) UAT feedback remediation and testing 1: May 2 - 6 (SmartSimple) UAT of remediation: May 7 – 8 (COJ) UAT feedback remediation and testing 2: May 9 (SmartSimple) UAT of remediation and Sign-off: May 10, 2019(COJ)
Milestone # 6	
Name:	Application Review and Decision
Deliverable(s):	Ability for scorers to score and review grant application. Ability for staff to make a decision on the application – awarding grants
Grant Detail Process Workflow Section(s):	3.0, 4.0
Due Date(s):	UAT demo release: June 21, 2019 UAT: June 24 - 28, 2019 (COJ) UAT feedback remediation and testing 1: July 2 - 5 (SmartSimple) UAT of remediation: July 8 - 9, 2019 (COJ) UAT feedback remediation and testing 2: July 10 (SmartSimple) UAT of remediation and Sign-off: July 11, 2019 (COJ)
Milestone # 7	
Name:	Post-Award Processing - Manage Grant Performance and Payments
Deliverable(s):	Ability for applicants to submit financial and performance information.
Grant Detail Process Workflow Section(s):	5.0, 5.1, 5.2, 5.3
Due Date(s):	UAT demo release: Aug 21, 2019 UAT: Aug 22 - 28, 2019 (COJ) UAT feedback remediation and testing 1: Aug 29 – Sep 3 (SmartSimple) UAT of remediation: Sept 4 - 5 (COJ) UAT feedback remediation and testing 2: Sept 6 (SmartSimple) UAT of remediation and Sign-off: Sept 9, 2019 (COJ)
Milestone # 8	
Name:	Manage Grant process City wide
Deliverable(s):	Reporting / Dashboards / Integration

Grant Detail Process Workflow Section(s):	8.0
RFP document ESC-0352-18.pdf Section(s):	CA1.13 and CA1.14
Due Date(s):	UAT demo release: Sept 5, 2019 UAT: Sept 6 – 12, 2019 (COJ) UAT feedback remediation and testing 1: Sept 13 – 17 (SmartSimple) UAT of remediation: Sept 18 – 19 (COJ) UAT feedback remediation and testing 2: Sept 20 (SmartSimple) UAT of remediation and Sign-off: Sept 23, 2019 (COJ)
Milestone # 9	
Name:	Go-live deployment / Implementation complete
Deliverable(s):	Transition to post implementation support.
Due Date(s):	Sept 30, 2019
Milestone # 10	
Name:	Training
Deliverable(s):	Remaining mandatory training
Due Date(s):	All system administrator training must be completed within 60 days of project closure.
Milestone #11	
Name:	Project Closure
Deliverable(s):	All components defined in this SOW function as specified. Applications/awards can be successfully moved through the entire award lifecycle.
Due Date(s):	Oct 29, 2019

12 Client Responsibilities and Assumptions

- Client will make available Manager level resources to provide business information as necessary.
- Client has sufficient resources to dedicate to this project.
- Client will provide all specifications on a schedule as agreed with SmartSimple. Any material revisions to specifications provided may incur additional fees.
- Client has done sufficient research with the constituent communities to verify the acceptance of the functionality, as defined herein, within those communities.
- Functionality is sufficiently defined in Client supplied documentation.
- Client will review deliverables and provide all feedback within time allotted in the schedule.

- Client is responsible for providing translations for all content required.

13 Acceptance Procedure and Criteria

All deliverables provided for approval shall be deemed accepted if, within the designated period of the UAT schedule, Client has not provided an email notice identifying any basis for rejecting the deliverable. Acceptable form for UAT signoff may be any of the following: a) email or b) completion of all outstanding tasks in the task tracker.

If any deliverable is rejected, Client will provide specific reference to the specifications in this Statement of Work and/or accompanying System Specifications Document that have not been adequately met.

No Acceptance Test will be deemed to have failed as a result of any deficiency which:

a) was not caused by SmartSimple or was not caused by AWS
b) was or should reasonably have been discovered by Client in a prior User Acceptance Test, but was not previously notified by the Client to SmartSimple in writing in connection with that User Acceptance Test; or
c) was minor in nature.

In the event of a dispute over acceptance of a milestone, Client will provide a written description of the reason(s) for the dispute. If the dispute involves more than one milestone, or has implications for the configuration of subsequent milestones, SmartSimple may discontinue work and extend the project schedule until the dispute is resolved.

14 Configuration Fees

14.1 Note about Configuration Fees

Pricing and effort defined in this Statement of Work are valid for duration of the project as per RFP (*SmartSimple_Sofware_Original_Response_to_ESC-0352-18.pdf). Price is subject to change if there is a change order which increases the scope.*

14.2 Fixed Fees (one-time fees)

Implementation and Training: $148,302

15 Payment Schedule

The fee schedule reflects the first 12 months of the contract Form 1 - Price Sheet (SmartSimple_Software_Original_Response_to_ESC-0352-18.pdf) in the SmartSimple response to RFP ESC-0352-18.

20% of the fixed fees are due upon signing.

A 10% holdback of the fixed fees is billable on the Project Closure milestone date (30 days after project completion).

The remaining 70% of fixed fees will be billed by milestone for services provided by the vendor upon COJ acceptance.

Milestone	Activity	%	Amount
Upon signing	Deposit - Upon signing	20%	$29,662
3	UAT Demo Release	7%	$10,381
3	Milestone sign-off	3%	$4,449
4	UAT Demo Release	7%	$10,381
4	Milestone sign-off	3%	$4,449
5	UAT Demo Release	7%	$10,381
5	Milestone sign-off	3%	$4,449
6	UAT Demo Release	7%	$10,381
6	Milestone sign-off	3%	$4,449
7	UAT Demo Release	7%	$10,381
7	Milestone sign-off	3%	$4,449
8	UAT Demo Release	7%	$10,381
8	Milestone sign-off	3%	$4,449
9	Milestone sign-off	10%	$14,830
30-day holdback		10%	$14,830
Totals		100%	$148,302

16 Signatures

IN WITNESS WHEREOF the parties have executed this Statement of Work as of the date first set forth above.

Client	
Name:	
Title:	
Signature:	
Date:	
I have authority to bind the City of Jacksonville.	

SmartSimple Software	
Name:	Cameron McLean
Title:	President
Signature:	
Date:	
I have authority to bind the Corporation.	

Payee Details

SmartSimple Software Ltd.
33 W 19th Street, 4th Floor, New York, NY, 10011
Bank Name: TD Bank
Branch Add 655 Avenue of the Americas,
New York, NY 10010
Account Number: 4274007644
US Routing Number: 026013673

SmartSimple requires a purchase order prior to commencing all work.
The purchase order details should be forwarded to accounting@smartsimple.com or your account manager.

This Statement of Work is valid for 90 calendar days from the date delivered to the Client.

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

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 3/08/18

OTHER: _____

ACTION OF AWARDING AUTHORITY DATE 3/08/18

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

Sam E. Mousa
Chief Administrative Officer
For Mayor Lenny Curry
Under Authority of
Executive Order No. 2015-05

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

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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:
Demonstrations and oral interviews conducted with the top four (4) vendors were completed on May 14, 2018. Recommend approval to enter into negotiations with the highest scoring bidder, SmartSimple Software, Ltd. The results of the negotiations will be documented and brought before the CSPEC Committee for approval.

eCivis, Inc.	211.26
HTC	201.21
SmartSimple Software, Ltd.	**235.41**
StreamLink Software, Inc.	231.14

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

ANALYST: Annette Burney

RESPECTFULLY SUBMITTED
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief, Information Technologies Division

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

MEMBERS APPROVING 5 MEMBERS DISAPPROVING Ø DATE: 5/24/18

OTHER:

ACTION OF AWARDING AUTHORITY DATE 5/24/18

APPROVED DISAPPROVED

OTHER

SIGNATURE OF AUTHENTICATION

Sam E. Mousa
Chief Administrative Officer
For: Mayor Lenny Curry
Under Authority of:
Executive Order No. 2015-05

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 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.

[illegible]	[illegible] Scores
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.

[illegible]	Maximum
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.

[illegible]	[illegible]
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