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:
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

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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

May 17, 2018

05/17/18 11:28:30
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

JPS 5/17/18

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

The Information Technologies Division (ITD) in conjunction with the Grants and Contract Compliance Office request approval to move forward into contract negotiations with the highest scoring vendor based on the evaluation results shown below.

On January 31, 2018, Procurement 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 ITD and Grants to proceed with demonstrations and sandbox evaluations on the four (4) highest scoring vendors. Dulles Technology Partners, Inc. proposal was rejected for failure to meet the minimum requirements and for failure to submit all addenda in accordance with the specifications. Coastal Cloud was deemed valid, but was not offered to the demonstration phase based on its application score of 65.

The four (4) vendors' overall evaluation results are summarized in the below table.

Vendor	Application (100 points max)	Demonstration (100 points max)	Sandbox (100 points max)	Total (300 points max)
eCivis, Inc.	**73.20**	**78.06**	**60.00**	**211.26**
HTC Global Services, Inc.	**83.50**	**65.71**	**52.00**	**201.21**
SmartSimple Software, Ltd.	**78.53**	**80.88**	**76.00**	**235.41**
StreamLink Software, Inc.	**79.70**	**77.44**	**74.00**	**231.14**

ITD, in conjunction with the Grants and Contract Compliance Office recommend to move forward into contract negotiations with SmartSimple Software, Ltd. as the overall highest scoring vendor for the evaluations results of the Grant Management SaaS Solution.

Your favorable consideration of this request is appreciated.

CC: Damian Cook, Grant Administrator
John Snyder, Human Service Planner III
Robert Hutchens, Senior Project Manager
Tom Ossi, Technology Contract and Records Manager

Cumulative Scores

FIRM		Rank
HTC Global Services, Inc.		
RFP Response	83.50	
Oral Demonstration	65.71	
Sandbox Environment	52.00	
Total	**201.21**	**4**
Streamlink Software		
RFP Response	79.70	
Oral Demonstration	77.44	
Sandbox Environment	74.00	
Total	**231.14**	**2**
SmartSimple		
RFP Response	78.53	
Oral Demonstration	80.88	
Sandbox Environment	76.00	
Total	**235.41**	**1**
eCivis		
RFP Response	73.20	
Oral Demonstration	78.06	
Sandbox Environment	60.00	
Total	**211.26**	**3**

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**
eCivis, 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**

Grant Management Software as a Service (SaaS) Solution

ESC-0352-18

	40 Points	10 Points	30 Points	20 Points	OVERALL	Rank
FIRM	Software Demonstration of Functional Business Areas	Technical Presentation of SaaS System Solution/Support/ Product Updates	Implementation Services Approach and Methodology	Qualification and Experience of Proposed Personnel	Total Points (100 max)	
HTC Global Services, Inc.						
Damain Cook	26.00	10.00	21.00	18.00	75.00	
Dawn Lockhart	21.00	5.50	18.00	14.00	58.50	4
Roger Belcher	16.00	6.63	24.99	16.00	63.62	
Average	21.00	7.38	21.33	16.00	**65.71**	
StreamLink Software, Inc.						
Damain Cook	36.00	9.17	27.00	18.00	90.17	
Dawn Lockhart	27.00	7.17	21.00	14.00	69.17	3
Roger Belcher	26.00	7.00	24.00	16.00	73.00	
Average	29.67	7.78	24.00	16.00	**77.44**	
SmartSimple Software Ltd.						
Damain Cook	36.50	9.17	27.00	18.00	90.67	
Dawn Lockhart	32.96	8.50	24.00	16.00	81.46	1
Roger Belcher	28.50	7.00	21.00	14.00	70.50	
Average	32.65	8.22	24.00	16.00	**80.88**	
eCivis						
Damain Cook	36.00	9.17	27.00	18.00	90.17	
Dawn Lockhart	27.00	6.50	24.00	12.00	69.50	2
Roger Belcher	28.00	7.50	23.01	16.00	74.51	
Average	30.33	7.72	24.67	15.33	**78.06**	

Streamlink Software Sandbox

		BR 1: Manage Funds	BR2: Apply for Grants - Grantor	BR3: Score and Review Applications	BR4: Award Grant to Applicant	BR5: Performance and Payment	BR6: Research Grants	BR7: Apply for Grants - Grantee	BR8: Centralized Administration of Funds	Total
Dawn Lockhart	A.1		7							7
	A.2									0
	B		7							7
	C		5							5
	D		7							7
	E		6							6
Damian Cook	A.1	9		9	9			9	9	45
	A.2				9			9	8	26
	B	7		5	9			8	7	36
	C	7		7	7			7	7	35
	D	8		8	8			8	8	40
	E	8		8	8			8	8	40
Rodger Belcher	A.1					7	7			14
	A.2					7	7			14
	B					5	7			12
	C					7	7			14
	D					6	7			13
	E					7	7			14

60 ÷ 80

.825 x 35

28.875 = 29

	Sum of Sub-Scores	Awarded points
A.1 - 35	0.825	29
A.2 - 5	0.5	3
B - 30	0.6875	21
C - 10	0.675	7
D - 10	0.75	8
E - 10	0.75	8
Total		74

SmartSimple Sandbox

		BR 1: Manage Funds	BR2: Apply for Grants - Grantor	BR3: Score and Review Applications	BR4: Award Grant to Applicant	BR5: Performance and Payment	BR6: Research Grants	BR7: Apply for Grants - Grantee	BR8: Centralized Administration of Funds	Total
Dawn Lockhart	A.1		9							9
	A.2									0
	B		10							10
	C		9							9
	D		9							9
	E		8							8
Damian Cook	A.1	9		9	9			9	9	45
	A.2				9			9	8	26
	B	7		5	9			8	7	36
	C	7		7	7			7	7	35
	D	8		8	8			8	8	40
	E	8		8	8			8	8	40
Rodger Belcher	A.1					6	4			10
	A.2					6	5			11
	B					8	7			15
	C					7	7			14
	D					7	6			13
	E					7	7			14

	Sum of Sub-Scores	Awarded points
A.1 - 35	0.8	28
A.2 - 5	0.4625	2
B - 30	0.7625	23
C - 10	0.725	7
D - 10	0.775	8
E - 10	0.775	8
Total		76

eCivis Sandbox

		BR 1: Manage Funds	BR2: Apply for Grants - Grantor	BR3: Score and Review Applications	BR4: Award Grant to Applicant	BR5: Performance and Payment	BR6: Research Grants	BR7: Apply for Grants - Grantee	BR8: Centralized Administration of Funds	Total
Dawn Lockhart	A.1		8							8
	A.2									0
	B		7							7
	C		8							8
	D		7							7
	E		6							6
Damian Cook	A.1	4		4	4			8	6	26
	A.2				4			8	6	18
	B	5		5	5			5	7	27
	C	9		9	9			9	9	45
	D	8		8	8			8	8	40
	E	0		0	0			0	0	0
Rodger Belcher	A.1					5	9			14
	A.2					5	9			14
	B					6	9			15
	C					7	7			14
	D					6	7			13
	E					7	9			16

	Sum of Sub-Scores	Awarded points
A.1 - 35	0.6	21
A.2 - 5	0.4	2
B - 30	0.6125	18
C - 10	0.8375	8
D - 10	0.75	8
E - 10	0.275	3
Total		60

HTC Global Services, Inc. Sandbox

		BR 1: Manage Funds	BR2: Apply for Grants - Grantor	BR3: Score and Review Applications	BR4: Award Grant to Applicant	BR5: Performance and Payment	BR6: Research Grants	BR7: Apply for Grants - Grantee	BR8: Centralized Administration of Funds	Total
Dawn Lockhart	A.1		7							7
	A.2									0
	B		6							6
	C		6							6
	D		5							5
	E		5							5
Damian Cook	A.1	7		9	10			0	6	32
	A.2				10			0	5	15
	B	5		5	8			0	5	23
	C	9		9	9			0	9	36
	D	3		4	3			0	3	13
	E	0		0	0			0	0	0
Rodger Belcher	A.1					6	4			10
	A.2					6	5			11
	B					6	6			12
	C					7	7			14
	D					7	5			12
	E					7	7			14

	Sum of Sub-Scores	Awarded points
A.1 - 35	0.6125	21
A.2 - 5	0.325	2
B - 30	0.5125	15
C - 10	0.7	7
D - 10	0.375	4
E - 10	0.2375	2
Total		52

FIRM	Software Demonstration of Functional Business Areas	Technical Presentation of SaaS System Solution/Support/ Product Updates	Implementation Services Approach and Methodology	Qualification and Experience of Proposed Personnel	Total Points (100 max)
HTC Global Services, Inc.					
Damain Cook	6.5	10	7	9	32.5
Dawn Lockhart	5.25	5.5	6	7	23.75
Roger Belcher	4	6.625	8.33	8	8
Average	5.25	7.375	7.11	8	27.735
StreamLink Software, Inc.					
Damain Cook	9	9.167	9	9	36.167
Dawn Lockhart	6.75	7.167	7	7	27.917
Roger Belcher	6.5	7	8	8	29.5
Average	7.416666667	7.778	8	8	31.19466667
SmartSimple Software Ltd.					
Damain Cook	9.125	9.167	9	9	36.29166667
Dawn Lockhart	8.24	8.5	8	8	32.74
Roger Belcher	7.125	7	7	7	28.125
Average	8.163333333	8.222	8	8	32.38555556
eCivis					
Damain Cook	9	9.167	9	9	36.167
Dawn Lockhart	6.75	6.5	8	6	27.25
Roger Belcher	7	7.5	7.67	8	30.17
Average					31.19566667

[illegible]	Maximum [illegible]
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

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

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 Criteria	Weighted 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.