



County of Wise, Virginia
P.O. Box 570
Wise, Virginia 24293
276-328-2321

January 11, 2020

Request for Proposals (WCO21-001):
Grant Management Solution for Wise County, Virginia

Proposals should be submitted via e-mail to procurement@wisecounty.org by the closing date and time detailed in the document below. Similarly, all inquiries concerning this RFP should be directed to in writing via email to the same address.

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1.0 Introduction

1.1 Organization Background

Wise County, Virginia (hereafter referred to as the “County”) is a rural community located in the southwesternmost corner of Virginia and the Central Appalachian region. As of the 2010 census, the County’s population was 41,452. The County’s government is comprised of elected offices including a Board of Supervisors, Clerk of Circuit Court, Commissioner of the Revenue, Commonwealth’s Attorney, Sheriff, and Treasurer, as well as administrative departments including the County Administrator Office, Economic & Industrial Development Office, Animal Control Office, Building and Zoning Office, Geographic Information Sciences Office, Office of Emergency Management, Public Works Office, Litter Control Office, Maintenance Office, and General Registrar Office. While each office is dependent upon grant funds for general operating purposes, special projects, and to maintain and improve public services offered, the grant process is ill-defined within offices and no common grant management process exists across the larger organization.

1.2 Purpose of RFP Solicitation

The County seeks Proposals (Proposals or RFP) from qualified vendors to provide a Grants Management Solution capable of supporting tracking, application, evaluation, award management, and administration for (1) grant funds to the County and (2) funds originating from the County and disseminated to sub-grantees.

2.0 Project Overview

2.1 Scope of Work

- Establish a common grant application and management platform to support the County’s role as both Grantee and Grantor
- Establish departmental level projects to be accomplished via grant funding
- Identify grants available to fund projects
- Increase grant win rates
- Track the County’s success rate in obtaining grants
- Improve comprehensive grant reporting by the County
- Track expenses on a grant and department level basis
- Monitor grant deadlines and deliverables
- Establish an audit trail for all grant activities including internal self-performed project activities
- Connect the County’s Financial Management System (Keystone) with grant management system software

2.2 Functional & Technical Requirements

A grant management software system shall be able to satisfy the below functional and technical requirements. If capable of meeting most of these requirements with limited exceptions, otherwise qualified vendors are still encouraged to submit proposals.

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| Functional Requirements |
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| Wise County as Grantor |
| <ul style="list-style-type: none"> ▪ Build and publish online applications |
| <ul style="list-style-type: none"> ▪ Application materials customizable per opportunity |
| <ul style="list-style-type: none"> ▪ Scoring parameters customizable per question/opportunity |
| <ul style="list-style-type: none"> ▪ Capture application submissions and associated documentation |
| <ul style="list-style-type: none"> ▪ Automatically check applications for accuracy and completeness |
| <ul style="list-style-type: none"> ▪ Lock opportunities after posted due date, disabling late submissions |
| <ul style="list-style-type: none"> ▪ Manage application review/evaluation workflows (identify and assign reviewer roles, timelines, etc.) |
| <ul style="list-style-type: none"> ▪ Assign external users as reviewers |
| <ul style="list-style-type: none"> ▪ Reviewer comments can be marked public (available to other reviewers) or private |
| <ul style="list-style-type: none"> ▪ Individual scores from each review, as well as summary scoring for all reviews |
| <ul style="list-style-type: none"> ▪ Send status updates and other communications (including notification of decisions) to grant applicants |
| <ul style="list-style-type: none"> ▪ Receive communications (as needed) from grant applicants |
| <ul style="list-style-type: none"> ▪ Allow updated grant application materials/revisions from applicants after the posted due date |
| <ul style="list-style-type: none"> ▪ Approve and create awards for selected recipients |
| <ul style="list-style-type: none"> ▪ Application materials (budgets and performance plans) pre-populate within system for ongoing management by award recipient |
| <ul style="list-style-type: none"> ▪ Prepare contract and grant terms based on standard templates |
| <ul style="list-style-type: none"> ▪ Accept and process electronic signatures |
| <ul style="list-style-type: none"> ▪ Process changes and amendments made to grants post-award |
| <ul style="list-style-type: none"> ▪ Approve and track payments/refunds to recipients |
| <ul style="list-style-type: none"> ▪ Create fund distributions, containing one or more sources of funding |
| <ul style="list-style-type: none"> ▪ Track budget and performance for fund distributions |
| <ul style="list-style-type: none"> ▪ Directly (or through a data bridge) interface with the County's Financial Management System (KeyStone) |
| <ul style="list-style-type: none"> ▪ Maintain auditable trail of all system activity with date, time and user ID |
| <ul style="list-style-type: none"> ▪ Multiple grants can be grouped together for a single funding opportunity |
| <ul style="list-style-type: none"> ▪ A single grant can be segmented into multiple funding opportunities |
| <ul style="list-style-type: none"> ▪ Report on budget and performance data entered into system by recipients |
| Wise County as Grantor - Services for Applicants |
| <ul style="list-style-type: none"> ▪ Searchable online database of available funding opportunities |
| <ul style="list-style-type: none"> ▪ Easily complete and submit applications for funding opportunities |
| <ul style="list-style-type: none"> ▪ Receive funding award/denial notifications |
| Wise County as Grantor - Services for Recipients |
| <ul style="list-style-type: none"> ▪ Required forms can be filled out and submitted |
| <ul style="list-style-type: none"> ▪ Reporting capabilities |
| <ul style="list-style-type: none"> ▪ Reports can be submitted within the platform |
| <ul style="list-style-type: none"> ▪ Upload documents and share with funder (the County) |
| Wise County as Grantee |
| <ul style="list-style-type: none"> ▪ Support a minimum of 20 users |
| <ul style="list-style-type: none"> ▪ Search online databases of available funding opportunities, including grants.gov |
| <ul style="list-style-type: none"> ▪ Receive automatic notifications of grants that meet saved search criteria |

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| ▪ Create new grant/project records |
| ▪ Multiple users can collaborate on a single application |
| ▪ Modify descriptive data about grant (e.g. program type, grant number, project title) |
| ▪ Assign unique number to each grant/project |
| ▪ Assign and modify budget data associated with a grant |
| ▪ Adjust budgets during grant lifecycle with proper approval |
| ▪ Create, assign, track and measure performance goals (numerical, percentage change, percent achieved) |
| ▪ Delegate portions of goals to specific projects or initiatives |
| ▪ Fully manage organization projects or initiatives including tasks, deadlines, data and communications |
| ▪ Upload and associate documents with grants, projects, contacts, etc. |
| ▪ Link multiple grants to one project or category |
| ▪ Segment grants into multiple projects, including splitting budget and performance activity data |
| ▪ Define and customize workflows based on funding type, approvals required, and department needs |
| ▪ Calendar function to track deadlines, tasks and assignments |
| ▪ Assign workflow notifications and reminders |
| ▪ Differentiate budget allocation spread by year and month over the grant's life |
| ▪ Differentiate budget allocation spread inside performance goals |
| ▪ Manage funding sources and track cash receipts |
| ▪ Apply indirect cost percentages by grant or category |
| ▪ Reconcile estimated indirect costs with actuals |
| ▪ Access the full grant data repository with configurable reporting |
| ▪ Configure standard and custom reports (e.g. budget spend down, sub-recipient performance completion) |
| ▪ Output reports to PDF and Excel |
| ▪ Control grant reporting tracking intervals |
| ▪ Support drill-down reporting to view underlying details |
| ▪ Combine grant budget and performance activity data into one project |
| ▪ Directly (or through a data bridge) interface with the County's Financial Management System (KeyStone) |
| ▪ Maintain auditable trail of all system activity with date, time and user ID |
| ▪ Ability to search or filter to find a particular set of grants, documents or communications within system |
| ▪ All data (including recipient, budget, performance, etc.) is captured as unique data elements |

| Technical Requirements |
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| Infrastructure and Security |
| ▪ Compatible with most web-browsers, including but not limited to Internet Explorer, Google Chrome, Safari and Firefox |
| ▪ Available via Windows and Mac operating systems |
| ▪ Maintain auditable trail of all system activity with date, time and user ID |
| ▪ Directly (or through a data bridge) interface with the County's Financial Management System (KeyStone) |
| ▪ Handle storage, extraction and retrieval of unlimited large attachments, including but not limited to PDF, DOC, XLS, and JPEG |
| ▪ Handle unlimited concurrent user sessions |

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| <ul style="list-style-type: none"> ▪ Require users to login using a unique username and password |
| <ul style="list-style-type: none"> ▪ Security features to restrict access according to user role |
| <ul style="list-style-type: none"> ▪ Communicate with other data structures via an established API |
| <ul style="list-style-type: none"> ▪ Data exportable in Excel, PDF, CSV format at any time |
| <ul style="list-style-type: none"> ▪ Execute redundant server management |
| <ul style="list-style-type: none"> ▪ Execute robust data backup processes |
| <ul style="list-style-type: none"> ▪ Encrypt data in transit and at rest |
| Hosting |
| <i>Provide basic details on infrastructure and hosting, including:</i> |
| <ul style="list-style-type: none"> ▪ Licensing Structure: Hosted, SaaS, or Standard Install |
| <ul style="list-style-type: none"> ▪ Hosting Provider |
| <ul style="list-style-type: none"> ▪ If Hosted, Security is Hosted By: |
| <ul style="list-style-type: none"> ▪ Application Uptime |
| <ul style="list-style-type: none"> ▪ Maximum Storage Available |

2.3 Implementation Services and Ongoing Support Services

A grant management software system shall have implementation and ongoing support services provided as part of this project. Please note in your proposal if any of the following services are available (included or as add-on services).

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| Implementation Services |
| Training Program |
| Scope of Training Offered (number of sessions, sample program outline, onsite vs. remote, etc.) |
| Business Requirements Gathering and Configuration of the Solution |
| Project Management |
| Data Loading/Migration Services |
| Documentation Provided (Technical and Support) |
| Integration Support |
| Ongoing Support Services |
| 24/7 Help Desk |
| Live Customer Support |
| Dedicated Account Manager |
| Support Response Times |
| Online Support/Resources |
| Timing & Frequency of Software Updates/Upgrades |

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2.4 Important Dates

The County will adhere to the following anticipated timeline when collecting and evaluating RFP responses. This timeline is subject to change. Any changes made to this timeline will be posted at <http://www.wisecounty.org/procurement/bids.html>

| | |
|--|-----------------------------|
| RFP Released: | January 11, 2021 |
| Bidder Questions Due: | January 22, 2021 |
| Answers to Questions Provided by County: | January 27, 2021 |
| Proposals Due: | February 5, 2021 at 4:30 PM |
| Anticipated Product Demonstrations: | February 8-12, 2021 |
| Notification of Selected Vendor: | February 15, 2021 |
| Contract Negotiation: | February 15-17, 2021 |
| Project Kickoff: | February 22, 2021 |
| Training Completed: | April 16, 2021 |
| System Go-Live: | April 19, 2021 |

2.5 Instructions for Responding

All parties responding to this RFP must deliver a single electronic copy of their proposal via email before 4:30 p.m. Eastern Time on Friday, February 5, 2021. Proposals should be submitted in a single Portable Document File with no additional files. Send email proposals to: **procurement@wisecounty.org**. Subject line of e-mail: Wise County Grant Management Solution RFP and Your Firm’s Name. Wise County reserves the right not to consider proposals received after the deadline of 4:30 p.m. EST Friday, February 5, 2021.

2.6 Evaluation Criteria

| Evaluation Factors | Total Points |
|--|---------------------|
| Functional and Technical Requirements | 40% |
| Implementation Services | 15% |
| Pricing (includes initial implementation fees and recurring costs) | 30% |
| Experience, Staffing, References | 15% |

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3.0 Submission Contents

Proposal submissions must include the following content, organized as outlined below. Failure to comply with the required formatting may result in disqualification.

3.1 Transmittal Letter

Letter signed by a binding officer of your company, briefly outlining your understanding of the scope of this project, your ability to meet the requirements outlined in this RFP, and a primary point of contact (including contact information).

3.2 Project Plan

Submit a detailed project plan to meet the functional and technical requirements, implementation services, and timeline outlined in the Project Overview. If unable to meet the proposed timeline, please include a proposed timeline that can be achieved.

3.3 Pricing

Include breakdown of cost proposal, including implementation fees, annual fees, and additional costs for add-on services.

3.4 Relevant Experiences and References

Provide a brief overview of your firm's experience, staffing, and three relevant project references.