

**County of El Dorado**  
**Chief Administrative Office**  
**Procurement and Contracts Division**  
solicitation on behalf of the

**Health and Human Services Agency**



**Request for Proposals (RFP)**  
**#23-918-033**  
for  
**Software as a Service (SaaS) Grants Management System**

**Submittal Deadline:**  
**January 16, 2023, not later than 3:00:00 PM (Pacific)**

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Attachment B – Proposer Budget Template

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\*The attached Sample Agreement for Services is for reference only. Other terms and conditions may apply based on the types of services and funding involved.

## 1.0 INTRODUCTION

The County of El Dorado (hereinafter referred to as the County) is located in Northern California and is bordered by Sacramento, Placer, Amador and Alpine counties in California, and Douglas County, Nevada. The two (2) incorporated cities in the County are Placerville and South Lake Tahoe. The United States (US) Census estimates that, as of 2020, the population of the County is 194,940.

The County's Procurement and Contracts Division, on behalf of the Health and Human Services Agency (hereinafter referred to as "HHS"), is soliciting sealed proposals from highly qualified and experienced firms (hereinafter referred to as "Proposer") to provide a full life-cycle Software as a Service (SaaS) Grants Management System (GMS) that can be integrated with the County's current Enterprise Resource Planning (ERP) financial system, Tyler Technologies' system product Munis, referred to in the County as "FENIX".

Firms must have and demonstrate their experience in providing technology solutions for a uniform grant management system that works across multiple divisions and program teams (experience with California local governments and prior integration with Tyler Technologies Munis is desirable). The County will award one (1) agreement to the top-ranked Proposer resulting from this competitive process to provide the SaaS GMS, related system training, and FENIX system integration services as described herein.

HHS is serving as the lead agency in spearheading this solicitation, with the intent to enter into one (1) agreement with the successful Proposer contingent upon award of this RFP. Subsequently, based upon need and budget availability from other County departments, the selected Proposer may also be contracted with one (1) or more additional County departments and enter into additional agreement(s) for the SaaS GMS implementation with those departments. The agreement(s) initial term is for an initial period of one (1) year, during which time the prices shall remain firm. Upon written agreement, the resulting contract(s) may be extended for additional years, under the same terms and conditions of the original agreement.

This Request for Proposal (RFP) includes a description of the evaluation and selection process, scope of work, proposal requirements, and insurance requirements.

The County is an equal opportunity employer (EOE). All individuals are encouraged to participate. The County will not discriminate against any individual because of race, religion, color, national origin, ancestry, physical handicap, mental disability, medical condition, genetic information, military or veteran status, marital status, age, gender, gender identity, gender expression, or sexual orientation.

The following schedule for the RFP process is for reference purposes and is subject to change:

RFP Issuance	December 12, 2022
Deadline for Questions	December 23, 2022
Answers Posted on or About	January 4, 2023
Due Date for Submissions	January 16, 2023

In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued and posted at:

<https://pbsystem.planetbids.com/portal/48157/portal-home> (“PlanetBids”).

Any amendment to this RFP is valid only if in writing and issued by the Chief Administrative Office, Procurement and Contracts Division. Verbal conversations or agreements with any officer, agent, or employee of the County that modify any terms or obligations of this RFP are invalid.

All interpretations or corrections, as well as any additional RFP provisions that the County may decide to include, will be made only as an official addendum that will be posted to PlanetBids and it shall be the Proposer’s responsibility to ensure they have received all addendums before submitting their proposal. Any addendum issued by the County shall become part of the RFP and shall be incorporated into the proposal.

The County will not be bound by oral responses or inquires or written responses other than written addenda.

## 1.1 Definitions

Grant funds and direct funding allocations (both referred to within this RFP as “grants”) are awarded to the County to facilitate a mandated service, incentivize performance goals, or to provide public services to County citizens that will improve their well-being. For the purposes of this RFP, the following definitions apply:

**Grant:** For simplicity’s sake, the term “grants” will be used within this RFP to refer to the different types of funding sources which are awarded and/or allocated to the County, typically by divisions of the State of California or the United States Federal Government, for a set dollar amount and an established term and performance period.

**Grantee:** A grantee is the recipient of grant or direct allocation funding awards. The County is a “grantee”, as it receives grant funding.

**Grantor:** A Grantor is a funding agency that posts funding opportunities, manages and evaluates applications submitted to said funding opportunities, and/or awards funding to an external agency through said funding opportunities. Within this RFP, a grantor can refer to either a funding agency that awards grant funding to the County, or to the County, as the County as subawards awarded grant funding to external parties.

**Grant Agreement (also referred to as Funding Agreement):** The grant agreement is the legal instrument a funding agency issues to the County to document a grant award, also referred to in an official capacity as a “Standard Agreement”. The Standard Agreement is the legally executed contractual document between the funder and the County and lists all terms of conditions of the grant, including any subaward terms and conditions that pass through to subcontracted vendors (if any of the funding is awarded to an external provider), and includes the grant funding amount, funding term, regulations, and allowable/non-allowable costs.

**Subaward Agreement:** A subaward agreement is a contractual instrument utilized by the County to subaward County awarded grant funding to an external contractor (also called a subcontractor), that is executed between the County and the contractor, binding the contractor’s agreement to complete a service or purchase a good on behalf of the County, in accordance with the terms and conditions of the County awarded grant, and which is paid for by the original grant agreements.

**Grant Budget:** The grant budget is the financial plan created by the County to report how specific grant funding is budgeted for expenditure by a grant’s eligible spending categories. Prior to the award of a grant agreement, the awarding agency or pass-through awarding agency approves the County’s submitted grant budget during the grant’s application submission process.

**Grant Budget Modification:** A grant budget modification must be processed and approved by the administering funding agency during the life of a grant if a grant’s approved budget by expenditure categories change.

**Grant Management:** Grant management requires oversight of the administrative and financial work and processes that goes into accessing and fulfilling the requirements of a grant. Grant management includes but is not limited to: managing a grant budget, applying grant regulations, tracking and budgeting grant expenditures, overseeing grant compliance, and fulfilling reporting requirements administered and passed down to the County by the awarding agency

**Grants Management System:** A Grants Management System refers to any online electronic grant system used to solicit, apply, review, manage, and close out a grant.

## 1.2 Background

HHSA provides a broad range of health and social services to promote wellness, self-sufficiency, and a better quality of life for individuals and families in El Dorado County. Within HHSA's structure, health and social services are developed and deployed by four (4) service divisions (Behavioral Health, Public Health, Community Services, and Social Services). Additionally, HHSA has a Fiscal and Administration Unit that provides agency-wide contracting, grant, compliance, accounting, fiscal, and administrative support to these divisions.

Within these divisions, HHSA administers the following programs to provide direct and contracted services to the community:

- Mental Health Services
- Alcohol and Drug / Substance Use Disorder Services
- Public Guardian
- Adult Protective Services and In-Home Services
- Child Welfare Services
- Self Sufficiency/CalWORKs
- Animal Services
- Housing and Homelessness Services
- Public Housing Authority
- Senior Services
- Veterans Services
- Energy Assistance and Weatherization Programs

In support of these programs, HHSA's Fiscal and Administration Unit manages an estimated \$35 million in grants annually, comprised of a variety of awarded local, state, and federal funds. County departments outside of HHSA can be viewed online at <https://www.edcgov.us/departmentsdirectory>. The County (not including HHSA) administered an estimated \$110 million in grant funding in 2021. County grant awards are administered by a variety of state and federal awarding agencies (referred as the "funder").

County administrative staff work closely with accounting and fiscal staff to ensure all grant agreements and grant financial activities are recorded and processed in the FENIX financial system. After grant funding agreements are fully executed between the responsible parties, administrative staff add the agreements into FENIX, and coordinate with fiscal staff to ensure that the grant is budgeted by the corresponding County department/division and that the applicable spending categories are recorded in FENIX.

Fiscal staff create a unique Project String for each grant, which is a code assigned within FENIX to track expenditures and staff time charged to the grant. Copies of the executed grant funding agreements are added to FENIX for repository filing and tracking purposes only. Grant agreements are

viewable in FENIX only by the associated County department that receives the award, as each County department has their own set of organizational codes to track by department.

Throughout the County, a substantial amount of awarded grant funding is subawarded to external providers (referred to as contractors and subcontractors) through formal subaward agreements to deliver services or purchase goods on behalf of County programs. These “subaward agreements” have attributes like grants, and have their spending and budgets connected to the County’s FENIX financial system. Both County awarded grant agreements and contracted subaward agreements require related expenditure and reimbursement activities to be recorded and trackable in FENIX.

### **1.3 Problem Statement**

Currently, as projected for Fiscal Year 2022-2023, the HHSF Fiscal Unit will be responsible for managing approximately \$121 million of revenue coming into the agency. The total volume of revenue that other County department fiscal staff (outside of HHSF) will manage in this same timeframe is anticipated to be doubled. Managing this volume of grant funding is a major undertaking with much of the workload carried out by County fiscal, programmatic, and grant-development staff.

The grants lifecycle refers to the entire process of a grant—from planning, to opportunity, to implementation, to closeout. This lifecycle originates from the notice of funding “the opportunity” provided by the funder, with the associated grant project steps and assignments traveling through the grant pipeline, beginning with the application process leading up to the grant award. Upon the County receiving notice of a grant award, there is a whole other set of grant management actions that must take place leading up to the closeout of the grant.

Consequently, each grant has associated project management activities that must be completed to fulfill the grantor’s requirements. These activities involve multiple steps and require collaborative input to be provided from various grant stakeholders (i.e., administrative, grant-writing, program, fiscal, management and executive management staff) throughout the grant lifecycle, originating from the grant’s pre-award stage leading through the post-award stage of the grant.

For each grant the County applies to, the following “pre-award” project tasks must be completed to include, but not be limited to the following:

- Complete an in-depth review and analysis of a funder’s posted Notice of Funding Announcement (NOFA), Request for Applications (RFA), or

other formal funding announcement, that a funding agency provides announcing a grant opportunity inclusive of grant requirements;

- Program staff make the initial determination to apply to a grant;
- Program staff receives official approval by County Department Head to apply to a grant (in line with County policy);
- Grant administration staff work with program(s) to create full narratives required for submission of the grant;
- Grant administration staff work with program(s) to develop the grant budget that fits within the allowable expenditure activities and allows the County to achieve the grant's desired outcomes;
- Administration staff prepare formalized grant addenda, that may include a resolution, that requires official approval by the County's local governing Board of Supervisors (if applicable);
- Complete project milestones and deliverables to be met by a grant's stated performance period timeline;
- County staff receive County Counsel approval on grant forms that include binding language, such as a grant's applicable terms and conditions, or forms that require a binding signature; and
- County staff complete and submit finalized grant application packet to the funding agency by the deadline.

For each grant the County is awarded, the following "**post-award**" project tasks must be completed to include, but not be limited to the following:

- Data entry of grant awards by cost categories and creation of and input of unique Project Strings into FENIX to include record keeping of grant agreements and associated documents;
- Data entry of grant subaward agreements into FENIX by cost categories and associated grant Project Strings to include record keeping of grant subaward agreements and associated documents;
- Data input and monitoring of County's direct grant expenditures and subcontractor's grant expenditures, including input of program approved invoices submitted to the County, to include the filing of associated back-up administrative receipts and invoices, all of which is entered and tracked in FENIX;
- Approval, processing, and data input of County subcontracted vendor invoices into FENIX, which vendors submit to County for reimbursement of eligible grant costs;
- County submission of Requests for Funds (RFF) to the associated grant funding agencies, to allow the County to receive reimbursements of expended County costs, inclusive of subcontracted County payments. These cost reimbursement grant activities for both County direct costs and subcontracted costs are input and tracked in FENIX, along with the storing of all back up invoice files;
- Completion of quarterly, annual, and ad hoc grant reports, typically related to required reporting on grant expenditures by cost categories,



and progress made in achieving committed grant milestones, with submission to of these required grant reports to the associated funding agencies; and

- Processing final closeout and reconciliation of grant activities in FENIX, with final closeout reports provided to funding agency.

While the County's FENIX financial system is the tool utilized by County fiscal staff to report, monitor and track grant expenditures and invoicing data, primarily only fiscal staff have full access to view and run reports of a grant's financial activities within FENIX. Consequently, non-fiscal staff rely heavily on County fiscal staff to provide grant expenditure reports on an ad hoc basis to fulfill the ongoing grant reporting requirements by federal and state funders. Reliance on County fiscal team members to provide financial reports from FENIX is inefficient and can cause delays in time-sensitive grant reports. Furthermore, FENIX does not provide any grant management capability or offer any project management task assignment features. As County non-fiscal staff utilize a variety of tools to track grants, the current systems are not unified and do not promote easy file sharing and transparency.

Over time, it has become apparent that the County's existing use of disparate grant tracking methods (e.g., spreadsheets, email, calendaring, web portal, file sharing, and various software platforms for functions such as grant reporting, contracting, purchase requisition and accounting) are disjointed, and do not promote file-sharing or task assignment among team members. Inherently, the lack of a unified GMS has resulted in isolated grant management filing and reporting systems to exist County-wide, which are not accessible by all team members, and does not allow all County staff to access grant related documents timely. Subsequently, grant reporting delays may occur due to departments relying on other's team members to share pertinent information related to a grant.

Additionally, as the County's FENIX system does not provide project management tools or automated support, County staff working on grants rely on assigning and tracking tasks manually, which creates its own set of challenges, as this can lead to human error, missed deadlines, and can result in communication gaps or delays in the transfer of information.

## **2.0 SCOPE OF WORK**

For the intent of this RFP, the County is soliciting qualified Proposers to propose a SaaS GMS, that can be fully integrated with the County's existing FENIX financial system, that also provides a project management solution to County employees working with grants. A final scope of work will be developed by the County and the Proposer and included in the resulting contract. The following scope of work serves only as a preliminary scope to generally communicate the County's goals and

expectations. Proposals for the SaaS GMS should include or account for, but not be limited to, the following scope of work:

## 2.1 Desired Solution

The SaaS GMS solution the County seeks will support the full grant lifecycle, unifying disparate data sources, files and processes. The proposed solution must allow for system controls that work within HHSA programs and County-wide departments, while also allow for flexibility to structure unique grants as needed and coordinate various grant programs. The SaaS GMS system will be used by staff from various HHSA programs which may also include other County departments, including but not limited to staff working in the following departmental roles: contracts, grants, fiscal, administrative, program, managerial, and executive team members assigned to various departments. These team members will engage the SaaS GMS platform while working within multiple stages of the full grants management life cycle. The GMS will be utilized to manage grants across multiple County programs and administered by multiple managers, fiscal, administrative, and grants support staff.

The ideal SaaS GMS solution will serve as a full grant record keeping system, sync with FENIX to ensure up-to-date financial data, and deliver full reporting capabilities of all grant activities throughout the grant lifecycle, including serving as a project management system as depicted in the following table, labeled Table A – Grants Management Lifecycle:

<b>Table A – Grant Management Lifecycle</b>		
<b>Pre-Award—Grant Application Process</b>		
Funding Opportunity	Board Items	Application Documents
<b>Grant Project Management and Task Assignment</b>		
Control User Access	Assign Tasks	Track Task Completion
<b>Grant Award Execution</b>		
Grant Agreements	Board Items	Executed Agreements
<b>Competitive Procurement Process (if applicable)</b>		
Competitive Solicitation to Subaward Grant	Solicitation Award Board Item	Contracting Out - Subaward Agreement(s)
<b>Invoicing / Fiscal Processing</b>		
Grant Budgets and FENIX Project Strings	FENIX & GMS Expenditure	Vendor Invoices / Reimbursement
<b>Grant Budgeting and Amendments</b>		
Budget Modifications	Board Acceptance	Agreement Amendments
<b>Grant Monitoring and Reporting</b>		
Grant Monitoring / Funder Audits	Grant Reporting	Grant Closure

## 2.2 Project Description

### A. Grant Statuses

Grants can have many different statuses, including in progress, applied, pending award, not awarded, pending agreement execution, agreement executed (grant is open), and closed (grant term has concluded and all invoices have been submitted). In addition to the grant status, grants have a long list of associated attributes, all of which essentially make up the grant as a unique object. These attributes include, but are not limited to: grant name, awarded division, grant administering program, term date, funding amount, funding match amount, funding source, funding agency, and other unique object IDs. Depending on when a grant agreement is awarded and executed, many grants are entered into FENIX with a retroactive term, meaning the term started prior to the actual agreement execution date. While the GMS should include a set boilerplate of required grant attributes, it should also allow for custom attributes to be added.

### B. Grant Award Allocation by Funding Agency

Within the County, some grants and/or allocations are provided to the County up-front in the form of a check for deposit, whereas, other grants are awarded in a reimbursement-based method, which requires the County to recoup funds only after grants funds are expended. For reimbursement based grants, the County must provide proof of expenditure, invoices, receipts, and general ledger evidence of the posted transactions, with all documentation submitted to the granting/funding agency via a request for reimbursement. This process results in delays for grant funds expended to be reimbursed, and in some instances, results in negative interest charges to a grant. The GMS system should have the capacity to track if a grant is issued up-front via check, or if reimbursement based.

### C. Grant Management

Grant management within the County is composed of managing the below major activities:

- 1) Grant budget
- 2) Grant expenditures, including accrued negative interest
- 3) Grant reimbursements
- 4) Grant performance period and term management
- 5) Monitoring and achieving a grant's expenditure deadlines
- 6) Competitive solicitation management - if the County opts to subcontract grant awarded funds to a vendor to perform services

and/or purchase goods on behalf of the County, in line with the expectations and budget of the grant

- 7) Administering a subgrantee/subcontractor's budget if any of County awarded grant funds are subawarded to a subcontractor
- 8) Monitoring and achieving a grant's project milestones and achievable
- 9) Grant compliance - meeting the terms and conditions outlined in the grant regulations
- 10) Audit monitoring by the grantor

The desired GMS will need to be able to track and report on the above related activities in addition to communicating/syncing with FENIX in such a way that expenses and reimbursements are tracked, and tied to the corresponding grants, so that County staff have an accurate idea of current grant budgeting and to ensure accurate grant reporting. The GMS should interface with FENIX to pull all grant related financial data to allow users to pull reports and view accurate snapshots of available and expended grant and subgrantee budgets.

#### D. Tyler Technologies product Munis — “FENIX” Financial System

Within the County's FENIX financial system, budgets are broken into a grant's budgeted expense categories, and the GMS will need to be designed to ensure that grant expenses can be broken down into their appropriate categories. Currently, when money is spent in FENIX, a request for reimbursement is generated in the form of an invoice. The GMS should track these invoices and connect them to the payment ultimately received and processed in FENIX. The GMS must have an interface that links FENIX and the GMS to ensure billable and not billable grant items are identified, based on criteria that may vary between grants. In addition to recording awarded, expended, and funder-reimbursed grant funds, the GMS must be designed to earmark funds that are expected to be spent, and potentially include expended funds that will be recovered through a reimbursement based grant. All this data should allow for an accurate snapshot of available and spent grant budget.

#### E. Project Management Necessity

Grants have multiple and varying requirements to manage, with related activities and events that must be met by specified due dates, some internal and some mandated by the funding agency. Such activities include but are not limited to tracking the following deadlines: grant application submission, governing board dates, mandated reporting, communication updates, expenditure deadlines, project milestones, performance period, grant term dates, and requesting funds, etc., all of which require collaboration to both the associated funding agencies and

internally to project staff. To allow ease for grant management of these activities, the GMS should provide user the ability to track deadlines, assign activities and view progress made on assignments, add in project due dates, and assign tasks for achievement of these activities.

To satisfy these needs, the GMS should serve as a Project Management System, and provide dynamic calendar features, with assignment automation to users, with capacity to track progress of these requirements, add assignments to other users, and to track due dates, as well as provided automation capacity to allow users to alert staff of upcoming due dates, preferably with the ability to integrate with the Microsoft Calendar. These requirements/events are assigned to staff to handle; however, the work is almost always peer reviewed and audited by other staff members (a process which may or may not be documentable in the new system). Upcoming due dates should trigger notifications, which should be deliverable both in-system as well as through email.

#### F. File Repository Necessity

Grants have associated files which will necessitate the existence of a connected file repository. This repository should offer the ability to mass export grant associated documents, preferably by date range, to aid with the development of mandated reports. This repository should offer different “types” of commonly uploaded files such as but not limited to:

- Grant Notice of Funding Opportunity (NOFA), Request for Applications (RFA) or other forms of funding opportunity notices published by the funder
- Letters of Intent to Apply
- Grant Application and Submission Documents
- Grant Budget
- County Counsel Blue Route approvals of grant documents with terms and conditions or binding signatures
- Governing Board Files and Resolution
- Custom Files - the ability to upload and label custom files (screenshots, emails, notes).

#### G. Grant Workflow Management

The management of grants generates a workflow. A desired feature of the grant management solution is to provide users insight into the workflow process. It would be useful to have access to information regarding grant due dates, grant workload by user assignment, number of grants in progress, awarded, and closed, total volume of awarded grant funds, and the number of grant requirements, etc., to monitor and improve the workflow of grant management. Ideally, as the GMS is built,

departments should be able to build in their desired workflow processes to streamline the reporting process to track the workflow.

#### H. Security

The grant management solution will require integrated security. Security should be available both at a user or role level, to allow for specific read/write/create permissions, as well as at an organizational level, to allow or disallow members of different departments from viewing certain grants.

#### I. Subaward Agreements

Grants often require, subaward agreements, which are contracts entered into by the County and an external vendor to complete a service or purchase a good in accordance with the original grant, and which is paid for by the original grant funds awarded to the County. These subaward agreements have attributes like grants and should have their spending and budgets connected to the GMS. Subcontracts that are not completed in a timely manner can lead to grant underspending, so the GMS solution should enable users to view the subcontract statuses for awarded grants, and these subcontracts should have their own unique statuses, similar to a grant such as:

- Agreement in development
- Agreement pending peer, program or supervisor review
- Agreement pending vendor review
- Agreement pending County Counsel approval
- Agreement pending governing Board approval
- Agreement pending execution
- Agreement fully executed with services planned to start by (set date)

As part of the terms of these subaward agreements, the County is required to monitor the contractor/subrecipient to confirm that they are spending the money properly and in accordance with the grants and contractual terms and condition. Within HHSA, this verification process is done via the program, Contract Administrator, and through fiscal oversight of submitted invoices and backup documentation and is also performed by HHSA's Compliance Unit through an annual monitoring process. This documentation should be uploaded to the GMS file repository unique to that subaward agreement.

#### J. Reporting Specifications

Given the variety of funding agencies, and the specific format and list of required documents needed for these agencies, it is unlikely that any GMS will be able to generate all the different reports required. However,

this system should allow for easy access to the data and files needed to complete the reports, as well as offer an accessible Standard Query Language (SQL) back end from which custom reports can be created to improve efficiency and aid the management process.

#### K. Grant Closeout

When the lifecycle of a grant has reached its term/expiration date, there should be the ability to “close out” a grant within the GMS, while retaining all the information generated during its lifecycle.

#### L. GMS Customization

The selected Proposer will work with County designated staff to develop the “look and feel” of the site to convey the contracting department/division’s unique grant management needs.

#### M. SaaS GMS Desired Outcomes

The ideal SaaS GMS will provide the following technical system improvements and benefits to allow the County to effectively manage and administer grants both awarded to and awarded by the County:

- 1) Include professional services to include importing and migrating existing grant records and financial data from the FENIX system to the new GMS;
- 2) Be fully integrated with and receiving live synchronized updates from the County’s Tyler Munis FENIX financial system, with both systems working seamlessly together and sharing live updates;
- 3) Reports and tracks the associated funding in/funding out grant activities in a centralized GMS system;
- 4) Provide a new, easily navigable GMS for County staff that provides increased accessibility for users, and improved utility and navigation by County departments and divisions accessing grant administrative and financial records;
- 5) Support the County’s grant management activities in its dual role as a grant-receiving organization (“Grantee”) and grant-making organization (“Grantor”);
- 6) Streamline grant management processes by centralizing activities within the SaaS GMS, including first-tier grant awards the County receives as a Grantee and subcontracted second-tier grant awards the County contracts out as the Grantor;
- 7) Provide a system solution that will lead to elimination of the County’s current siloed grant management tracking systems and record-keeping of grant activities among multiple non-unified systems;

- 8) Provide accessible and transparent data in the GMS, ensuring grant related activities and reports are accessible by the necessary internal County staff;
- 9) Provide Project Management functions, to allow grant task and assignment automation, track project task completion, and provide automated project management notifications to assigned task users, managers and project owners;
- 10) Be easy for departmental users to update without relying on County Information Technology (IT) staff or vendor support to make the necessary changes;
- 11) Ease the burden on County staff for file sharing as system serves as the County's primary grant record keeping system, with capacity to allow system users the ability to upload, view, edit, and/or access grant related documents and run financial reports (i.e., funding notices, grant application documents, grant and subcontractor contractual agreements, direct County and subcontractor grant expenditures, invoices, RFFs, and financial reports), thereby eliminating staff's need to rely on other departments to share information;
- 12) Provide system capability for GMS project managers to assign user access in edit and view modes to specified staff;
- 13) System Security—provide cybersecurity features, automated, and asynchronous updates to website software and plug-ins as required if threats and vulnerabilities are discovered;
- 14) Provide initial training and ongoing as needed to identified County staff on new GMS platform; and
- 15) If applicable, as proposed firm does not perform the necessary FENIX and SaaS system updates for County systems, train and provide as-needed technical assistance to designated GMS project managers on how to provide real-time and scheduled FENIX migration changes.

### **2.3 GMS Technical and Security Requirements**

Included in this RFP is Attachment A – Proposer Application, Functional, Security, and Technical Grants Management System Specifications which lists all the County's GMS technical and security requirements and desired specifications. Within this document, Proposers can view which of these functional or security specifications are categorized by the County as "mandatory", "highly desirable", "desirable", or "useful". Proposers shall complete all of the worksheets included in this attachment to notify the County if the proposed SaaS GMS can meet these requirements.

### **2.4 Project Implementation Outline**

The following project phase outline is provided to demonstrate what HHSA, as the lead County department soliciting a Proposer through this RFP,



anticipates the project will involve. This outline shall be further discussed and modified with the awarded Proposer, in conjunction with the proposed timeline and as needed during the project with HHSA. If the outcome of this RFP's evaluation process results in more than one (1) agreement awarded to the successful Proposer for the GMS, by County departments outside of HHSA, this project outline may be modified to suit individual County departments as any additional County department(s) seek agreements.

#### A. SaaS GMS Concept

- 1) Determine Content for GMS
  - a) Interview key stakeholders for needs assessment
  - b) Identify system needs based on RFP scope of work and to include external factors provided during interview assessment
  - c) Evaluate HHSA FENIX system for content for inclusion and migration of existing data to the GMS
  - d) Document all content required for GMS
  - e) Document relationships between unique FENIX and GMS content for use during system implementation and migration
- 2) Identify Navigation Structure
  - a) Determine the functional top level navigation tabs (may be unique for each County department)
  - b) Determine the sub-level navigation tabs (may be unique for each County department)
- 3) Undergo Presentation and Concept Acceptance
  - a) Develop concept to report findings and provide recommendations
  - b) Present to HHSA, IT and grant management project stakeholders for system approval
  - c) Obtain and implement suggestions

#### B. System Customization

- 1) Design Customized Site Layout
  - a) Organize system structure
  - b) Determine all specifications needed for various grant management functions (may be unique for each County department)
  - c) Assess program needs for functionality of system (may be unique for each County department)
  - d) Determine a look and feel for the site, including customized add-ins and project navigation tools (may be unique for each County department)
- 2) Design Presentation and Design Acceptance
  - a) Present to HHSA, IT and grant management project stakeholders
  - b) Obtain and implement suggestions
  - c) Ensure final system acceptance and approval

- C. Development
  - 1) Develop HHSA GMS
    - a) Create visual demonstration of how the user interfaces will operate
    - b) Create user interface templates for staff to add, change or delete
    - c) Create HHSA program needs for functionality of system
    - d) Create mockup system
    - e) Develop GMS based on HHSA unique needs (and/or additional County departments needs if additional departments are identified as initial outcome of proposal)
  - 2) Testing
    - a) Develop user testing
    - b) Perform Usability testing
  - 3) Development Presentation and Development Acceptance
    - a) Present to HHSA, IT and grant management project stakeholders
    - b) Obtain and implement suggestions
    - c) Ensure final development acceptance and approval
  - 4) GMS and FENIX Integration – identify what FENIX reports, roadblocks, and system tools are needed to ensure successful migration of grant content from FENIX to GMS system
- D. Implementation
  - 1) Install SaaS GMS
  - 2) Install objects and components developed
  - 3) Perform site, usability and stress testing
  - 4) Project Implementation Acceptance
  - 5) Present to HHSA, IT and grant management project stakeholders
    - a) Obtain and implement suggestions
    - b) Ensure final acceptance and approval of final project
  - 6) Go Live – New HHSA GMS site is up and running
- E. Training and Support/Maintenance
  - 1) Train staff
    - a) Provide training to applicable personnel
    - b) Provide documentation that outlines FENIX integration/life updates/ and ongoing GMS maintenance process
  - 2) Provide Support Options
    - a) Provide support documentation
    - b) Provide Contract designated contact(s), phone number and hours of operation for support/technical assistance
    - c) Process for obtaining and installing updates

## 2.5 Browser/Device Compatibility

Any new SaaS GMS for this project should be easily viewable from a PC desktop computer or laptop of any manufacture. The below lists all County current accepted server operating systems and database platforms. The

County requires servers that will meet the following Center for Internet Security (CIS) compliances dependent upon operating system/services installed:

- 1) Microsoft IIS 10.0 v1.0.0 - IIS 8.0 v1.5.0 - IIS 7 v1.8.0
- 2) Windows Server 2016 v1.1.0 - Server 2012 v2.3.0
- 3) Debian Linux 9 v1.0.0 –Linux 8 v2.0.1
- 4) Ubuntu Linux 18.04 v1.0.0 –Linux 16.04 v1.0.0
- 5) Apache HTTP Server 2.4 v1.5.0 - HTTP Server 2.2 v3.6.0
- 6) Apache Tomcat 8 v1.0.1 - Tomcat 7 v1.1.0
- 7) Microsoft SQL Server 2017 v1.0.0 – SQL Server 2016 v1.1.0 – SQL Server 2014 1.4.0

## **2.6 User Interface System Requirements**

To allow GMS project managers to assign County staff (GMS users) to edit, view, add, and/or upload grant information in the SaaS GMS, designated system managers shall be provided the capabilities to assign user access by username to create, control and publish online content as follows:

- User permissions;
- Approval workflows;
- Search only capabilities; and
- Form upload and edit options.

## **2.7 FENIX Data Migration and GMS Implementation**

The selected Proposer will ensure existing FENIX grant content is consolidated and migrated to the newly developed SaaS GMS. Implementing a SaaS GMS will provide HHSA, and other participating County departments, the opportunity to restructure and update its grant management content in a system outside of FENIX. County IT will function as a trusted adviser to HHSA and other departments that enter into an agreement for the SaaS GMS and work closely with the selected Proposer for technical support, system needs, and other project support as needed during the project implementation.

As the County has a significant investment in the FENIX system, County staff will continue to utilize FENIX as the primary financial system, with existing and new grant data to continue to be entered, tracked, updated, and retained in FENIX. It is important to note that the GMS will not replace FENIX and is intended to compliment the FENIX financial system by serving as a grants management solution that will interact and provide synchronized financial migration of content from FENIX to the GMS on a consistent basis. Ideally, the migration of updated grant content from FENIX to the GMS will take place on a nightly basis. In addition, based on feasibility, HHSA would like to have all FENIX historical and existing grant financial data migrated to the new GMS prior to the full “go-live” date of the system.

Data and file migration from the County FENIX existing financial system will require integration of existing grant and subgrantee records and financials into the new SaaS GMS. The HHSA Chief Financial Officer, or other designated HHSA fiscal management staff members, will serve as HHSA's primary FENIX migration point of contact(s), in coordination with County IT, to assist the selected Proposer with FENIX migration content.

It is anticipated that the SaaS GMS will be customizable in terms of desired content, features, and custom reporting needs. As such, HHSA fiscal and County IT staff will be designated to serve as the lead project implementation work-group and will liaison with the selected Proposer to provide expertise on the FENIX migration and the SaaS GMS projects. These contacts will be provided to the selected Proposer in the resulting contract, and/or throughout the project implementation as needed.

Proposals should include the necessary process for migrating the grant data and files from the existing FENIX system. This includes indexing and integrating existing content into the new GMS and the process for designing the custom navigation structure.

## **2.8 System Training**

The selected Proposer will also need to assist with product implementation as well as user training, and work with the stakeholders to identify the level of ongoing support required. The selected Proposer shall provide education and guidance on best practices for tailoring the GMS to meet the participating County department's needs and provide initial training to identified staff on utilizing and administered the SaaS GMS. The County expects the selected Proposer to work closely with HHSA, IT, and other key County staff members to answer questions and give demonstrations on the GMS site features, and ensure identified staff are adequately trained on the appropriate methods to adjust or modify reporting templates, user views, and individual pages or templates in the SaaS GMS. In addition, the selected Proposer shall provide a system user guide upon project completion, as the new GMS will bring new technologies to the County and new ways to use existing technologies.

## **3.0 MINIMUM ELIGIBILITY REQUIREMENTS**

Proposers must meet the following minimum eligibility requirements to be considered responsive to this RFP:

1. Demonstrate that they are an established organization with the experience and capacity to provide the SaaS GMS solution and services outlined in this RFP, with a minimum of three (3) years performing a similar scope of work. To establish that the responding organization meets this requirement, the

Proposer will indicate the number of years the organization has been providing related services, with a brief summary of the services performed, in the Cover Letter (refer to Section 4.1 of this RFP).

2. Complete all worksheets included in the Attachment A – Proposer Application, Functional, Security, and Technical Grants Management System Specifications workbook included in this RFP, to be attached to the proposal submission labeled “Application.”
3. Provide a minimum of three (3) client references, preferably local governments, municipalities, or service districts in California, of organizations with whom the Proposer currently has contracts with and/or previously had contracts with for the provision of services of similar type and scope, by submitting a completed Attachment C – Reference Worksheet. (Each reference shall include company or organization name, contact person, title, email address, telephone number, length of business relationship, and summary of services performed. Verify that all reference information is current and accurate especially that of the contacts and contact information prior to submitting a response.)
4. Certify that the Proposer’s organization understands that if selected, they will be required to ensure that the SaaS GMS provided by the organization will comply with all required County of El Dorado SaaS Terms and Conditions (as shown in Attachment D).

The certification indicated above (items numbered 1 and 4) should be included in the “Cover Letter” specified in Section 4.1. All required documentation (items numbered 2 and 3) must be attached in response to this RFP.

**Proposals received that fail to meet the requirements identified above will be rejected as nonresponsive and will not be evaluated.**

#### **4.0 PROPOSAL FORMAT REQUIREMENTS**

Each response to this RFP shall include the information described in this section. Failure to include all of the elements specified may be cause for rejection. Additional information may be provided but should be succinct and relevant to the goals of this RFP. Excessive information will not be considered favorably.

The document shall be 8-1/2 inches by 11 inches in size. Unnecessarily elaborate responses, enclosures, and specialized binding are not desired, and may be construed as an indication of Proposer’s lack of cost consciousness.

All proposals shall contain the following elements, and in the order given:

**4.1 Cover Letter** must at least contain the following information:

- A. Title and number of this RFP
- B. Name and Mailing Address of firm (include physical location if mailing address is a P.O. Box)
- C. Year the firm was established
- D. Type of organization of firm (partnership, corporation, etc.)
- E. Proposer's Primary Contact person including telephone number, fax number, e-mail address, and physical mailing address
- F. A statement indicating the number of years the proposing organization has been providing SaaS GMS solutions, with a brief summary of related experience (as outlined in Section 3.0, Eligibility Statement 1).
- G. A statement certifying the Proposer's organization, if selected, ensures that the SaaS GMS provided by the organization will comply with all required County IT Department's provided data security policies and guidelines.
- H. The cover letter must also include the following required statements:
  - 1) Public Records Act – I/We acknowledge that the proposal and its contents are not considered proprietary; OR I/We have identified the following portions of our proposal in detail that I/we wish to declare as proprietary and/or confidential and have included detailed reasons, including specific exemptions allowed by the California Public Records Act/Government Code. (Proposers shall list the portions and reasons following this statement. Please note that all proposals may be considered public information. Subsequent to award of this RFP, all or part of any proposal may be released to any person or firm who may request it. Therefore, proposers may request in their Cover Letter if any portion of their proposal should be treated as proprietary and not released as public information (refer to Section 14, Public Records Act, below for additional information)).
  - 2) Substitution of Designated Staff – I/We assure that the designated project team, including subcontractors (if any), is used for this project and that departure or reassignment of, or substitution for, any member of the designated project team or subcontractor(s) shall not be made without the prior written approval of the County.

- 3) Conflict of Interest – I/We warrant that no official or employee of the County has an interest, has been employed or retained to solicit or aid in the procuring of the resulting contract, nor that any such person will be employed in the performance of such contract without immediate divulgence of such fact to the County in writing.
- 4) Non-Collusion – I/We warrant that this offer is made without any previous understanding, agreement or connection with any person, firm, or corporation submitting a separate proposal for the same project and is in all respects fair, without outside control, collusion, fraud or otherwise illegal action.
- 5) Sample Agreement and Insurance Requirements – I/We agree with the provisions contained within the Sample Agreement for Services included as Attachment D to this RFP and can/will meet the indemnity and insurance requirements without alterations to the County's requirements and that the cost of complying with the County's insurance requirements is included in our cost proposal. I/We agree to provide complete and valid insurance certificates within ten (10) days of the County's written request and acknowledge that failure to provide the documents within the time stated may result in the rejection of this proposal.
- 6) Debarment and Suspension Certification – Title 49, Code of Federal Regulations, Part 29 – Proposer certifies that, under penalty of perjury, except as noted, Proposer or any other person associated therewith in the capacity of owner, partner, director, officer, manager, including any proposed subcontractors:
  - a) Is not currently under suspension, debarment, voluntary exclusion, or determination of ineligibility by any Federal agency;
  - b) has not been suspended, debarred, voluntarily excluded or determined ineligible by any Federal agency within the past three (3) years;
  - c) does not have a proposed debarment pending; and
  - d) has not been indicted, convicted, or had a civil judgment rendered against it by a court of competent jurisdiction in any matter involving fraud or official misconduct within the past three (3) years.

Any exceptions to the above are included in the Exceptions portion of our response, including to whom it applies, initiating agency, and dates of action.

Note to Proposer: Exceptions will not necessarily result in denial of award but will be considered in determining the firm's responsibility. Providing false information may result in criminal prosecution or administrative sanctions. The above certifications are part of the Proposal.

**4.2 Signatory Requirements:** In order to receive consideration, the Cover Letter must be signed by an officer empowered by the Proposer to sign such material and thereby commit the Proposer to the obligations contained in the RFP response. **Further, the signing and submission of a response shall indicate the intention of the Proposer to adhere to the provisions described in this RFP and a commitment to enter into a binding contract.** Submittals shall be signed by one of the following representatives:

- A. If the Proposer is a **partnership**, submittal shall be signed in the firm name by a partner or the Attorney-In-Fact. If signed by the Attorney-In-Fact, there shall be attached to the proposal a Power-Of-Attorney evidencing authority to sign proposals, dated the same date as the proposal and executed by all partners of the firm.
- B. If the Proposer is a **corporation**, the submittal shall have the correct corporate name thereon and the actual signature of the authorized officer of the corporation written (not typed) below the corporate name. The title of the office held by the person signing for the corporation shall appear below the signature of the officer.
- C. If the Proposer is an **individual** doing business under a firm name, the submittal shall be signed in the name of the individual doing business under the proper firm name and style.
- D. If the Proposer is a **non-profit organization** (i.e. 501[c]3), the submittal shall be signed by the Executive Director of the organization with additional evidence submitted to demonstrate the Executive Director has been delegated to have signature authority by the organization's governing body.

**4.3 Required Documents for Proposal Submission**

In addition to the Cover Letter, Proposers must provide the following documentation in their RFP submission:

- A. Proposers must submit and attach a fully completed Attachment A, Proposer Application, Functional, Security, and Technical Grants Management System Specifications (included in this RFP), to be attached to the proposal submission labeled "Application";



- B. Proposers must submit and attach a fully completed Attachment B, Proposer Budget Template (included in this RFP), to be attached to the proposal submission labeled “Budget”; and
- C. Proposers must submit and attach a fully completed Attachment C, Reference Worksheet (included in this RFP), to be attached to the proposal submission labeled “References”.

#### 4.4 Proposal Narrative

- A. Complete Proposer Application Responses to Attachment A - Proposer Application, Functional, Security, and Technical Grants Management System Specifications.

All Proposers must complete all of the worksheets included within Attachment A. Within this workbook, response to the Functional and Security Requirement sections are being evaluated and scored as reflected in the below:

- 1) Proposed GMS Functional Requirements - The thirty-four (34) functional requirement questions that are identified as mandatory (“M”) in Attachment A will have graded responses by the below point values assigned to those categories: (Maximum Point Value: 102)
  - Fully Meets - 3 points
  - Could Meet with Custom Development - 2 points
  - Partially Meets - 1 points
  - Does Not Meet - 0 points
- 2) Proposed GMS Security Requirements – Eight (8) questions with a Yes/No/Partial response options graded by the below point values: (Maximum Point Value: 8)
  - Yes - 1 point each
  - No - 0 point each
  - Partial Response - .5 point for each partial feature provided
- 3) Proposed GMS Technical Requirements - not scored
- 4) Proposed GMS Additional Technical and Security Requirements - not scored

- B. Plan for Services

The plan for services should address the Proposer’s plan, including any optional and/or additional service components unique to the approach for providing these services. All descriptions of plans should be detailed

and include measurable outcomes, defined timelines, and the activities/steps that will be taken to achieve the outcomes identified.

At a minimum, the plan for services also address the following:

- 1) Describe the proposing organization's overall intent, ability, and capacity for providing the system solutions solicited in this RFP, including the organization's proposed GMS solution, system's project management capabilities, strategy for implementation, and plan for services;
- 2) Describe the organization's proposed process for evaluating departmental system needs, and migrating the grant data and files from the participating County department's FENIX financial system, including the capabilities the proposed SaaS GMS provides involving interfacing and providing live synchronous content updates with Tyler Technologies product Munis ("FENIX");
- 3) Describe the Proposer's process for collaborating and coordinating with HHS staff, IT, and other County key stakeholders involved in the project, throughout all phases of the project from inception, approval, and implementation leading up to project completion;
- 4) Describe the organization's plan to provide training to ensure that designated County staff are successful in learning and utilizing any new technology and systems implemented, and are trained in their supporting role in administration, management, maintenance and on-going operations of the proposed GMS; and
- 5) Provide an overall timeline, detailing the projected time required for each major step or phase of the project for the GMS implementation, inclusive of the HHS FENIX integration process, from start to the estimated system implementation completion.

### C. Qualifications and Experience

The Qualifications and Experience section should provide an overview of the organizations history and experience providing similar services, highlighting local government project experiences, in areas related to the scope of this RFP.

At a minimum it should also address the following:

- 1) Describe the proposed organization's overall experience providing SaaS GMS solutions and Tyler Technologies product Munis system integration services, with a similar scope, including all work performed on provision of services to other municipal governments;
- 2) Describe the Proposer's expertise and background, analyzing corporate and government systems for visual, organization and technical improvements and system implementations, including the organization's demonstrable successes with similar projects;

- 3) Describe the proposed project staffing, including providing team member's background and experiences, their specific contributions to past similar projects, and the responsibilities of the proposed contributing staff, as related to this project;
- 4) Describe what the County can expect from the Proposer in terms of an implementation and system training guide, including any required components and additional features the Proposer believes will make their work product the best possible solution for the County;
- 5) Describe the Proposer's overall capacity to assist the County in achieving the stated ideal goals included in Section 2.0 Scope of Work, "2.1 Desired Solution" and "2.2(M), SaaS GMS Desired Outcomes"; and
- 6) Describe the Proposer's organizational and communicative process for tracking and documenting project implementation steps leading up to the system completion status.

D. Cost Proposal - Budget and Budget Narrative

All Proposers must complete and submit a proposed budget using Attachment B – Proposer Budget Template, outlining the expected cost of the services, broken down by cost categories. Important considerations are as follows:

- The completed budget should include line items for all Direct Costs, Billing Unit, Payment Schedule, and fully-burdened rates for services identified in this RFP for an anticipated one (1) year term for provision of SaaS GMS user licenses and technical assistance/training services (as shown in Attachment B).
- All fees must be fully burdened and inclusive of all costs, benefits, expenses, and overhead, for the services referenced in this RFP.
- All proposed costs should include a description or formula indicating how the total cost amount was determined.

In addition to completing Attachment B, all Proposers must submit a Budget Narrative. At a minimum, the budget narrative should address:

- 1) All factors of cost included for budget line items proposed, including an itemized cost schedule for all tasks necessary regarding the development and implementation of the SaaS solution and explain all future/ongoing costs as they relate to the County's continued use of the SaaS; and
- 2) A description of how these costs are necessary and reasonable for the delivery of software and services solicited in the RFP.

## 5.0 PROPOSER QUESTIONS

- 5.1 Questions regarding this RFP must be submitted in writing by email to: [matthew.potter@edcgov.us](mailto:matthew.potter@edcgov.us), U.S. mail to the Procurement and Contracts Office (see Section 5.6 below for mailing address information), or using the PlanetBids website, and must be received no later than 5:00:00 p.m. (Pacific) on **December 23, 2022**.
- 5.2 All emails must have “**RFP #23-918-033 – QUESTION**” as their subject, and all envelopes or containers must be clearly marked “**RFP #23-918-033 – QUESTION**” for clarity. Emails, envelopes, and/or containers not clearly labeled may be overlooked and not responded to.
- 5.3 Questions will **not** be accepted by telephone, facsimile (fax), or orally.
- 5.4 The County reserves the right to decline to respond to any question if, in County’s assessment, the information cannot be obtained and shared with all potential organizations in a timely manner.
- 5.5 A summary of the questions submitted, including responses deemed relevant and appropriate by County, will be posted to the PlanetBids website on or about **January 4, 2023**.
- 5.6 All inquiries regarding this RFP shall be submitted by email to: [matthew.potter@edcgov.us](mailto:matthew.potter@edcgov.us) or by U.S. Mail to:
- County of El Dorado  
Procurement and Contracts  
330 Fair Lane  
Placerville, California 95667  
RFP #23-918-033 – Question
- 5.7 Proposers are cautioned that they are not to rely upon any oral statements that they may have obtained. Proposers shall direct all inquiries to the contact above and shall not contact the requesting department or other County staff directly regarding any matter related to this RFP. Information provided by other than Procurement and Contracts staff may be invalid and proposals which are submitted in accordance with such information may be declared non-responsive.

## 6.0 PROPOSAL SUBMITTAL INSTRUCTIONS

- 6.1 Proposers are strongly encouraged to submit their responses online to assure a complete and timely response. To respond online firms must register with the County’s online bidding system, PlanetBids, at <https://pbsystem.planetbids.com/portal/48157/portal-home>. Proposers are cautioned that the timing of their online submission is based on when the

submittal is RECEIVED by PlanetBids, not when a submittal is initiated by a Proposer. Online submittal transmissions can be delayed in an “Internet Traffic Jam” due to file transfer size, transmission speed, etc. For these reasons the County recommends that Proposers allow sufficient time to upload their response and attachment(s) (if applicable) and to resolve any issues that may arise. The closing date and time shall be governed by the PlanetBids web clock, which does not allow submittals after the closing date and time. PlanetBids will send a confirmation email to the Proposer advising that their online submission (eBid) was submitted. If you do not receive a confirmation email you are advised to contact the PlanetBids Support team by phone (818-992-1771 Monday through Friday between 7 a.m. and 5 p.m. Pacific, excluding statutory U.S. holidays) or by submitting a Support Ticket (visit <https://solutions.planetbids.com/support/> to complete and submit the ticket form).

- 6.2 Proposers that decide to submit a hard-copy response do so at their own risk. All hard-copy submittals must include all of the same information required for online submittals. Incomplete submittals will be rejected as non-responsive. Proposers shall submit one (1) original hard-copy and one (1) electronic copy of their proposal in PDF format on a flash/USB drive. All hard-copy submittals shall be submitted in a sealed envelope or container and clearly marked “**RFP #23-918-033 – SaaS Grants Management System – DO NOT OPEN**” with the closing date and time noted on the outside of the parcel.
- 6.3 It is the sole responsibility of the Proposer to ensure that the proposal is received in the Procurement & Contracts Division prior to the RFP submittal deadline. All responses must be submitted not later than the date and time posted on PlanetBids. Hard-copy responses shall be submitted ONLY to:

County of El Dorado  
Procurement and Contracts Division  
330 Fair Lane  
Placerville, CA 95667

- 6.4 The County shall not be responsible for proposals delivered to a person or location other than specified herein. Proposals submitted to a location other than the above will not be considered duly delivered or timely. The County shall not be responsible for rerouting proposals delivered to a person or location other than that specified above.
- 6.5 Faxed or emailed proposals shall not be accepted.
- 6.6 Late proposals will not be accepted or considered.
- 6.7 All proposals, whether selected or rejected, shall become the property of the County and shall not be returned.

- 6.8 The County reserves the right to waive minor defects and/or irregularities in proposals and shall be the sole judge of the materiality of any such defect or irregularity.
- 6.9 All costs associated with proposal preparation and submission, including any interviews conducted at the sole discretion of the County, shall be borne by the Proposer.
- 6.10 It is the responsibility of the Proposer to ensure that the proposal is received in the Procurement & Contracts Division prior to the proposal opening due date and time.
- 6.11 Any hard-copy submittal received prior to the date and time specified for receipt of submittals may be withdrawn or modified by written request of the Proposer. Requests for modification must be received in writing, and in the same number of copies as the original submittal, prior to the date and time specified above for receipt of submittals.

**7.0 EVALUATION PROCESS**

All proposals will be evaluated initially to determine if they are responsive to the requirements of this RFP. An evaluation panel, consisting of County staff and members selected by County staff, will review and evaluate all responsive proposals received by the submittal date as set forth in this RFP, or as amended by addenda, and the proposals will be evaluated based on the thoroughness, clarity, and quality of the material presented. The County reserves the right to request additional information and clarification of any information submitted and to allow corrections of errors or omissions.

Proposers who have the qualifications (expertise and skills) and experience (documented, successful, and relevant) necessary to meet the requirements of this RFP will be scored and ranked using the criteria and point assignments listed below. Proposers submitting the most highly ranked proposals may be invited for interviews.

	<b>Evaluation Criteria - Written Proposal Submittals</b>	<b>Maximum Points</b>
A.	Mandatory Functional and Security Requirements from Proposer Application (Attachment A)	110
B.	Plan for Services (Section 4.4(B))	40
C.	Qualifications and Experience (Section 4.4(C))	30
D.	Cost Proposal - Budget and Budget Narrative (Section 4.4(D), including Attachment B)	20
E.	References (Attachment C)	10
	<b>TOTAL POSSIBLE POINTS</b>	<b>210</b>

## Evaluation Criteria – GMS Demonstration (if held)

The top ranked Proposers from the written proposal evaluation may be invited to provide the evaluation panel a demonstration of the proposed solution, with the following evaluation criteria and rating points used to evaluate the Proposers who are invited to provide a demonstration.

	<b>Evaluation Criteria – GMS Demonstration</b>	<b>Maximum Points</b>
A.	Experience and Qualifications of Firm/Staff	20
B.	Grants Management System Overall Fit	30
C.	FENIX Interface Capacity and Project Management Capabilities	30
D.	GMS Demonstration	20
	<b>TOTAL POSSIBLE POINTS</b>	<b>100</b>

### 8.0 SELECTION PROCEDURE

- 8.1 County staff will open and review proposals for responsiveness following the submittal deadline. The names of the Proposers that submitted proposals will be made available after the RFP deadline has passed. The contents of all proposals, or any other medium which discloses any aspect of the RFP, shall be held in strictest confidence until the County releases a Notice of Award or Notice of Intent to Award.
- 8.2 The County reserves the right to reject any or all proposals, to waive minor irregularities in said proposals, or to negotiate minor deviations with the successful Proposer. The County shall be the sole judge of the materiality of any such defect or irregularity.
- 8.3 A Selection Committee appointed by the County will evaluate the proposals. It is anticipated that representatives from the County and other local government entities, if necessary, will conduct the evaluations. The Selection Committee may interview Proposer firms during the selection process if it is determined to be necessary.
- 8.4 When evaluation of the proposals has been completed, one (1) Proposer will be selected and negotiations will be initiated. If for any reason a contract cannot be negotiated, the County reserves the right to select the next highest ranked Proposer. The County will then make recommendations for selection to the Purchasing Agent or County Board of Supervisors based on the criteria outlined in the preceding sections.
- 8.5 The County reserves the right to award a contract to the Proposer who, in the sole judgment of the County, presents the most favorable response to

this RFP pursuant to the evaluation criteria indicated above. The County reserves the right to make an award without further discussion of the submittal with the Proposer. Therefore, the proposal should be submitted initially on the most favorable terms that the firm or individual may propose.

- 8.6 In the case of differences between written words and figures in a proposal, the amount stated in written words shall govern. In the case of a difference in unit price versus the extended figure, the unit price shall govern.
- 8.7 The Procurement and Contracts Division does not mail out hard copy letters advising participating Proposers of RFP results. For RFP results, please visit the PlanetBids website at:

<https://pbsystem.planetbids.com/portal/48157/portal-home>

RFP results are also available at:

<https://www.edcgov.us/Government/Contracts/Pages/Bid-Results.aspx>

- 8.8 The results of this RFP will be posted on the PlanetBids and County website listed in Section 8.7 above at the earliest possible opportunity in accordance with County policy. The timeline for posting RFP results may vary depending on the nature and complexity of the RFP.
- 8.9 The selected Proposer will receive written notification of the award. Response and selection of a proposal will not necessarily result in the award of a contract with the County of El Dorado. Proposal opening does not constitute awarding of a contract. Contract award is by action of the Purchasing Agent or Board of Supervisors and is not in force until fully executed.

## **9.0 EL DORADO COUNTY WEBSITE REQUIREMENTS**

It is the Proposer's responsibility to monitor the PlanetBids website for possible addenda to this RFP to inform him/herself of the most current specifications, terms, and conditions, and to submit his/her proposal in accordance with original RFP requirements and all required addenda. All available RFPs and related addenda can be found at:

<https://pbsystem.planetbids.com/portal/48157/portal-home>

Failure of Proposer to obtain this information shall not relieve him/her of the requirements contained therein. Those Proposers not acknowledging and returning Addenda as required will not be considered and will be rejected as "non-responsive."



## **10.0 REJECTION OR PROPOSALS**

Proposers interested in being considered must submit a proposal in compliance with this RFP. Failure to meet the minimum requirements of the RFP shall be cause for rejection of the proposal. The County reserves the right to reject any or all proposals.

The County may reject a proposal if it is conditional, incomplete, contains irregularities, or reflects inordinately high cost rates.

## **11.0 VALID OFFER**

Proposals shall remain valid for one hundred twenty (120) days from the due date. The County reserves the right to negotiate with the successful Proposer any additional terms or conditions not contained in their proposal which are in the best interest of the County or to otherwise revise the scope of this RFP. This RFP does not constitute a contract or an offer of employment.

## **12.0 COUNTY'S RIGHTS**

The County reserves the right to:

1. Request clarification of any submitted information.
2. Waive any irregularity or immaterial deviation in any proposal.
3. Not enter into any agreement.
4. Not select any Proposer.
5. Cancel this process at any time.
6. Amend this process at any time.
7. To award more than one (1) contract if it is in the best interest of the County.
8. Interview Proposers prior to award.
9. To request additional information during an interview.

Waiver of an immaterial deviation shall in no way modify the RFP documents or excuse the Proposer from full compliance with the contract requirements if the Proposer is awarded the contract.

## **13.0 CONFLICT OF INTEREST**

Proposers warrant and covenant that no official or employee of the County, or any business entity in which an official of the County has an interest, has been employed or retained to solicit or aid in the procuring of the resulting agreement, nor that any such person will be employed in the performance of such agreement without immediate divulgence of such fact to the County. Proposals shall contain a statement to the effect that the Proposer is not currently committed to another project that would constitute a conflicting interest with the project defined in this RFP.

## **14.0 PUBLIC RECORDS ACT**

Pursuant to the California Public Records Act ("CPRA"), the County may be required to produce records of this transaction, upon third party request, subject to various statutory exemptions. Please indicate what exemptions may apply to the information you submit (such as a 'proprietary information' exemption – refer to Section 4 for submittal instructions). Please note that designating information as "proprietary" does not guarantee non-disclosure.

In the event of a request for such information, the County will make best efforts to provide notice to Proposer prior to such disclosure. If Proposer contends that any documents are exempt from the CPRA and wishes to prevent disclosure, it is required to obtain a protective order, injunctive relief or other appropriate remedy from a court of law in El Dorado County before the County's deadline for responding to the CPRA request. If Proposer fails to obtain such remedy within County's deadline for responding to the CPRA request, County may disclose the requested information. The County shall not in any way be liable or responsible for the disclosure of any such records.

Proposer further agrees that it shall defend, indemnify and hold County harmless against any claim, action or litigation (including but not limited to all judgments, costs, fees, and attorney's fees) that may result from denial by County of a CPRA request for information arising from any representation, or any action (or inaction), by the Proposer.

## **15.0 BUSINESS LICENSE REQUIREMENT**

It is unlawful for any person to furnish supplies or services or transact any kind of business in the unincorporated territory of El Dorado County without possessing a County business license unless exempt under County Code Section 5.08.070. Contact the Tax Collector's Office at 360 Fair Lane, Placerville, CA 95667, or phone (530) 621-5800, for further information.

It is not a requirement to possess a County business license at the time of proposal submittal. Selected Proposers may be required to possess a County business license to award contract.

## **16.0 PUBLIC AGENCY**

It is intended that other public agencies (i.e., city, special district, public authority, public agency, and other political subdivisions of the State of California) shall have the option to participate in any agreement created as a result of this RFP with the same terms and conditions specified therein, including pricing. The County shall incur no financial responsibility in connection with any agreement from another public agency. The public agency shall accept sole responsibility for contracting for services and making payment to the vendor.