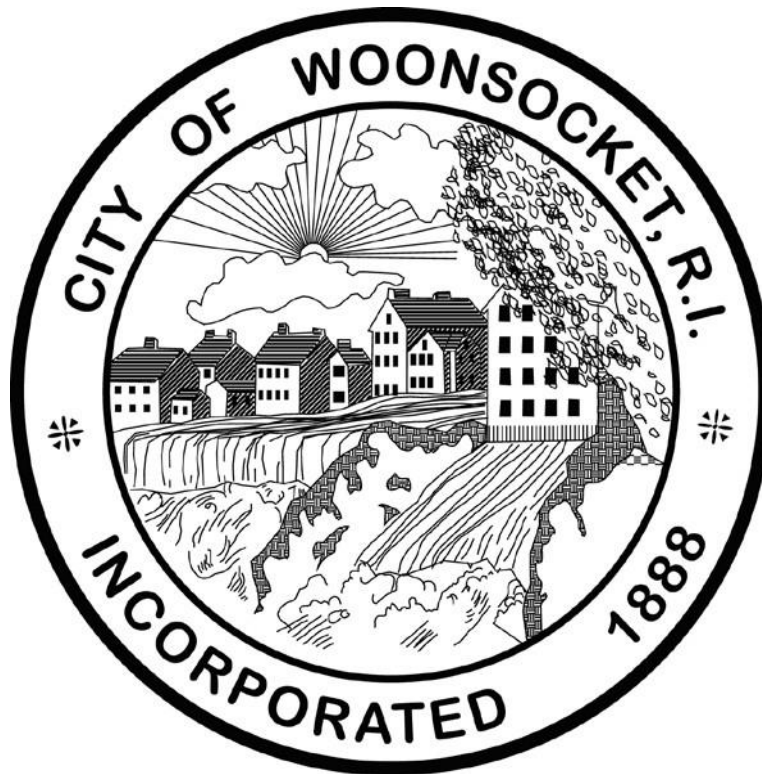


City of Woonsocket



Online Grants Management Software

BID No. 6160

Bid Specifications

*Prepared By: City of Woonsocket
August 2023*



**PLANNING AND DEVELOPMENT
CITY OF WOONSOCKET, RHODE ISLAND**

**INVITATION TO BID FOR:
"Online Grants Management System"
BID No. 6160**

Sealed bids must be received, and date/time stamped by the City of Woonsocket, in the Finance Department, Office of Purchasing, City Hall, 169 Main Street, Woonsocket, RI 02895 no later than Wednesday, **September 20, 2023 @ 2:00 p.m.** Then in the **2nd Floor Conference Room**, at the same address, at the aforementioned date and time, on-time bids will be publicly opened and read aloud.

All proposals must be duplicated and submitted in a clearly marked, sealed envelope, with the following information: **"Online Grants Management System, Bid No.6160"**

Unless otherwise specified, the City reserves the right to accept or reject Bids/Proposals, in whole or in part, and to waive any informalities or irregularities not affecting substantial rights which is in the best interest of the City. This document is a Request for Proposal (RFP). As such, proposal pricing alone may not guarantee an award recommendation. As necessary to meet the needs of the City, elements of the proposal may be subject to negotiations. All proposals submitted by the proposal opening date will be reviewed for responsiveness. Certain proposers may be interviewed.

EVALUATION CRITERIA: Selection of the successful proposer will be based upon, but not limited to, the considerations as outlined under the Evaluation Process in the proposal.

Individuals requesting interpreter services for the hearing impaired should call the Finance Director at 401-762-6400 seventy-two (72) hours in advance of the bid opening.

Unless otherwise specified, the City reserves the right to accept or reject Proposals in whole or in part, and to waive any informalities or irregularities not affecting substantial rights as may be in the best interest of the City. No bidder may withdraw their bid within sixty (60) days after the actual time and date of the bid opening thereof.

Published: 08/21/2023

**Cindy Johnston,
Finance Director**



PLANNING AND DEVELOPMENT
CITY OF WOONSOCKET, RHODE ISLAND

GENERAL CONTRACT PROVISIONS

1.0 RECEIPT AND OPENING OF PROPOSALS:

1.1 The City of Woonsocket, acting through its Purchasing Agent (referred to as the “City”), is responsible for the format, final content and publication of all Requests for Proposal or Invitations to Bid (herein collectively referred to as “Proposal” or “Proposals”) to be approved by the City of Woonsocket’s Finance Department.

1.2 Sealed Proposals must be received, and date stamped by a representative of Woonsocket City Hall, Office of Purchasing, 169 Main St., Woonsocket, Rhode Island 02895, up until the deadline as indicated in the published solicitation or addendum.

1.3 Published solicitations do not commit the City to pay any costs incurred by any bidder in conducting or making the necessary studies or designs for the preparation thereof, or for procuring or contracting for the items to be furnished in any submitted Proposal.

1.4 Proposals received after the time and date indicated in the published solicitation or addendum will not be considered nor opened and may be returned to the bidder as such.

1.5 At the time of the opening of Proposals, each bidder will be presumed to have read and to be thoroughly familiar with all items contained in the published solicitation, including all addenda. The failure or omission of any bidder to have examined any form, instrument or document will in no way relieve a bidder from any obligation in their Proposal once the Proposal has been publicly opened.

2.0 FORM OF PROPOSALS:

2.1 Each Proposal shall be in accordance with specifications and instructions contained herein.

2.2 Proposals must be printed in black or blue ink or typewritten. **Proposals written in pencil or red ink are not allowed.**

2.3 Blank spaces must be filled in as required or an “N/A” must be placed in that space if the item is not applicable to the Proposal being submitted. No changes are permitted in any of the documentation unless the change is accompanied by an approved addendum.

2.4 Additionally, the Proposal must contain the bidder’s company name and proper address. It must be signed by an individual that is duly authorized to sign in the name, and on behalf, of the respective bidder for the purposes and consideration expressed in their Proposal accompanied by their official title.

2.5 Proposals which are not complete, contain any omissions, erasures, alterations, additions or irregularities of any kind, are subject to being rejected.

2.6 At any time prior to the Proposals being publicly opened, the bidder may modify his/her Proposal by written communication. If a correction needs to be made to any item in the submitted Proposal, those changes must be made with a single strike out (*Example: ~~Change~~*), with blue or black ink, must be initialed and dated in close proximity of the correction and remain clearly legible.



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2.7 Bidders are responsible for submitting bids, submitting modifications or sending withdrawal requests, so as to reach the Office of Purchasing prior to the time specified in the solicitation or addendum.

2.8 Only modification, to an already submitted bid may be authorized to use an alternate form of transmission (i.e., electronic mail or facsimile) with the prior consent and at the discretion of the purchasing agent.

2.9 If the intent of the bidder's written communication is not clearly identifiable, the interpretation most advantageous to the City will prevail.

3.0 SUBMITTING A PROPOSAL:

3.1 The City of Woonsocket shall receive each proposal/bid either by mail, or in person no later than the time indicated, at Woonsocket City Hall, Office of Purchasing, Attn: Purchasing Agent, 169 Main St., Woonsocket, Rhode Island 02895. **FAXED or E-MAILED Proposals are not accepted.**

3.2 Each Proposal must be submitted in duplicate, unless otherwise noted, and each sealed envelope/package must be plainly marked on the exterior with the bid number and bid name. Two (2) complete hard copies, each in a 3-ring binder, plus one (1) additional electronic copy on a USB flash drive must be submitted.

3.3 Late proposals/bids will not be considered.

3.4 It is the bidder's responsibility to verify that the Proposal has been timely received and delivered to the purchasing department prior to the opening date and time. The City is not responsible for late receipt of a Proposal, regardless of the reason for the delay. Proof of transmission or of mailing doesn't constitute proof of receipt.

3.5 At any time prior to the Proposals being publicly opened, the bidder may withdraw his/her Proposal by written communication. Telephonic, Emailed or Faxed withdrawals are not accepted.

3.6 No Proposal may be withdrawn for a period of sixty (60) calendar days after the Proposals have been publicly opened. The City reserves the right to waive this requirement to best serve the interests of the City.

3.7 Negligence on the part of the bidder in preparing the Proposal confers no rights for the withdrawal of their Proposal after it has been opened.

3.8 Proposals received prior to the scheduled opening deadline will be secured and will remain unopened.

3.9 No responsibility will attach to an officer or person of the City for the premature opening of a Proposal which has not been properly marked or identified. Any Proposal opened prematurely due to the failure of the Bidder to mark the envelope in accordance with Section 3.0 will be considered non-responsive and returned to the bidder.

3.10 The City may consider any Proposal not prepared and submitted in accordance with the provisions of the solicitation as non-responsive.

3.11 The City reserves the right to waive any informalities that are merely a matter of form and not of substance. It also pertains to some immaterial defect in a bid or variation of a bid from the exact requirements of the invitation that can be corrected or waived without being prejudicial to other bidders.



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3.11.1 The defect or variation is immaterial when the effect on price, quantity, quality, or delivery is negligible when contrasted with the total cost or scope of the supplies or services being acquired.

3.12 The City reserves the right to reject any and all Proposals if in the City's interest.

4.0 ADDENDA AND INTERPRETATION:

4.1 No interpretation of the meaning of the specifications or other documents will be made to any bidder orally. Every request for such interpretation must be made in writing and either addressed to the purchasing agent, City of Woonsocket, 169 Main Street, Woonsocket, Rhode Island 02895, or e-mailed at ken.allaire@woonsocketri.org

4.2 To be given consideration, all inquiries must be received by the date and time as noted in the solicitation. If no date is provided in the solicitation, the City will gather any inquiries received and will collectively respond to and publish those responses no later than seven (7) calendar days prior to the date of the bid opening.

4.3 Any and all such inquiries, corrections, interpretations, and any supplemental instructions will be in the form of written addenda. All addenda will be posted, at a minimum, on the City's website, in the "Bid Opportunities" section, beneath the specific corresponding solicitation. All addenda become part of the specification document from their effective dates.

4.4 It is the bidder's responsibility to check for and download any and all posted addenda up to the bid opening date and time.

4.5 Each bidder must ascertain, prior to submitting their Proposal that they have received all addenda issued and must acknowledge the receipt in their submitted Proposal.

4.6 No addenda will be posted later than four (4) calendar days prior to bid opening date except for an addendum, if necessary, postponing the opening date or the withdrawal of the solicitation.

4.7 Any written or oral instructions concerning a solicitation, unless supported by an addendum, regardless of the source of that information, is non-binding, should not be relied upon and is not considered part of the specification documents.

4.8 In the event there is a discrepancy between verbal communication and written communication, the written communication will govern.

5.0 PROPOSED PRICE(S):

5.1 Bidders must state the proposed price(s) in the manner as designated in the Solicitation.

5.2 The final proposed, extended, total price should be stated both numerically and in written words.

5.3 In the event that there is a discrepancy between the unit price and the extended total, the City will choose between the unit price or the extended total whichever is lowest.



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5.4 In the event there is a discrepancy between the price written in words, and the price written numerically, the City will choose between the price written in words or the price written numerically, whichever is lowest.

6.0 CONSIDERATIONS FOR REJECTING PROPOSALS:

6.1 Unless otherwise specified, the City reserves the right to accept or reject Proposals in whole or in part, and to waive any informalities or irregularities not affecting substantial rights as may be in the best interest of the City.

6.2 The City reserves the right to reject the Proposal of any Bidder who has previously failed to perform properly or complete on time Contracts of a similar nature, who is not able to perform the Contract, has habitually, without just cause, neglected the payment of bills, or disregarded its obligations to sub-Contractors, materials, or employees.

6.3 The City reserves the right to reject any or all Proposals not accompanied by a requirement set forth in the Solicitation Documentation or if the Proposal, in any way, is incomplete or irregular and subject to Section 3.10 through 3.12.

6.4 in accordance with R.I. Gen. Laws § 45-55-7 the City may reject a Proposal based on any of the following conditions:

- A. Bid prices are in excess of available funding.
- B. When multiple bids are received, all but the lowest 3 bidders can be rejected.
- C. In the event when only one (1) bid is received, that bid can be rejected. A noncompetitive negotiation can commence with that bidder in accordance with § 45-55-8.

7.0 PAYMENT TERMS:

7.1 All payment terms with the City are Net 60 (sixty) days.

7.2 Cash discounts offered will be considered in determining awards. However, discounts for a period less than twenty (20) days will not be considered. The discount period must be computed from the date the correct invoice is received by the City.

8.0 STATE & FEDERAL TAXES:

8.1 The City of Woonsocket is exempt from the Rhode Island sales or use tax under the 1956 General Laws of the State of Rhode Island, Section 44-18-30, Para. 1, as amended.

8.2 The City of Woonsocket is exempt from the payment of any excise tax or federal transportation taxes.



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9.0 QUALIFICATIONS OF BIDDER:

9.1 The City may make such investigations as it deems necessary to determine the ability of a bidder to perform the work, and the bidder must furnish to the City all such information and data for this purpose as the City may request.

9.2 The City reserves the right to reject any Proposal if the evidence submitted by, or investigation of such bidder, fails to satisfy the City that such bidder is properly qualified to carry out the obligations of the Contract and to complete the work according to the specifications.

9.3 One or more of the following conditions will result in the disqualification of a bidder and rejection of his/her Proposal:

- A. Evidence of collusion among bidders.
- B. A material misrepresentation in a Proposal.
- C. Bidder's failure to meet the minimum criteria for responsiveness and responsibility.

10.0 AWARD AND CONTRACT:

10.1 It is the intent of the City, in accordance with state procurement regulations, to award a Contract promptly following the public opening of Proposals.

10.2 Contracts are awarded to the most responsive and responsible bidder offering the most advantageous price. It is contingent upon the bidder submitting their Proposals in accordance with the requirements set forth in the solicitation and judged to be reasonable and does not exceed the funds available.

10.3 A "Responsive Bidder" is a bidder who has submitted a Proposal, which conforms to all material aspects of the solicitation. Whereas a "Responsible Bidder" relates to the bidder's ability to satisfactorily perform the work.

10.4 The City reserves the right to determine the most responsive and responsible bidder in any way determined to be in the best interest of the City. An award may be based on any or all the following factors:

- A. Adherence to all conditions and requirements of the solicitation.
- B. Price and Payment Terms.
- C. Qualifications of the bidder, including past performance, financial responsibility, general reputation, experience, service capabilities, and facilities.
- D. Delivery lead time or completion date.
- E. Product appearance, workmanship, finish, feel, overall quality, and results of product testing.
- F. Maintenance costs and warranty provisions.
- G. Repurchase or residual value.



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10.5 The City reserves the right to consider total cost of ownership as a factor in the final award recommendation (i.e., transition costs, training costs, etc.).

10.6 The City reserves the right to award by item, part or portion of an item, group of items or total Proposal, to reject any and all Proposals in whole or in part, if, in the City's judgment, it is in the best interest of the City to do so.

10.7 The City reserves the right to award multiple, optional use Contracts. In addition to the other factors listed, offers will be evaluated on the basis of advantages and disadvantages to the City which may result in the awarding of a Contract to multiple bidders.

10.8 The successful respondent will receive an award letter with further instructions along with City department contact information.

10.9 Respondents that were not chosen will receive a courtesy notification letter that the award decision has been made.

11.0 LIQUIDATED DAMAGES FOR FAILURE TO ENTER INTO CONTRACT:

11.1 Upon failure or refusal to enter into a Contract or complete the Contract at the price in the Proposal, Bidder must forfeit to the City, as liquidated damages for such failure or refusal, the surety (i.e., Bid Bond) that may have been included in the Proposal.

11.2 The Bidder's forfeiture of the surety must be a waiver of all rights as a bidder under the Contract and must relieve the City of all responsibility to said bidder.

12.0 TIME OF COMMENCEMENT/COMPLETION:

12.1 A written award (or acceptance of a Proposal) mailed (or otherwise furnished) to the successful bidder and will be considered accepted by the City seven (7) calendar days following the transmitted or post marked date. The award letter may be followed by a City purchase order which will be deemed to result in a binding Contract without further action by either party.

12.2 The successful bidder, upon the notification of the acceptance of their Proposal, as defined in Section 12.1, must within ten (10) calendar days execute and deliver the Contract documents, insurance and bonds required by the solicitation.

12.3 The successful bidder must agree to commence work thirty (30) calendar days after acceptance by the City unless otherwise notified by a "Notice to Proceed" from the City, written communication by the Department Director or his designee.

12.4 Allowances may be made when a force majeure event has occurred.

12.4.1 A **force majeure** event may include, but is not limited to the following: (a) acts of God; (b) flood, fire, earthquake or explosion; (c) war, invasion, hostilities (whether war is declared or not), terrorist threats or acts, riot or other civil unrest; (d) government order or law; (e) actions, embargoes



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or blockades in effect on or after the date of this Agreement; (f) action by any governmental authority; (g) national or regional emergency; (h) strikes, labor stoppages or slowdowns or other industrial disturbances; (i) epidemic, pandemic or similar influenza or bacterial infection (which is defined by the United States Center for Disease Control as virulent human influenza or infection that may cause global outbreak, or pandemic, or serious illness); (j) emergency state; (k) shortage of adequate medical supplies and equipment; (l) shortage of power or transportation facilities; and (m) other similar events beyond the reasonable control of the impacted party.

12.5 After the offer has been presented to the successful bidder, and the successful bidder has accepted that offer, herein the bidder will further be referred to as the "Contractor".

13.0 LAWS AND REGULATIONS:

13.1 All applicable federal and state laws, City ordinances (including zoning ordinances) and the rules and regulations of all authorities having jurisdiction applies to all Contracts and they are deemed to be included in all Contracts the same as though written out in full.

13.2 In the event of any inconsistencies between the above laws, regulations, or ordinances versus the provisions of the Contract, the laws, regulations, or ordinances will prevail.

14.0 EQUAL EMPLOYMENT OPPORTUNITY:

14.1 The City has adopted an **Equal Employment Opportunity Clause**, which is incorporated into all specifications, purchase orders, and Contracts, whereby a supplier agrees not to discriminate against any employee or applicant for employment as defined in Section 15.2.

14.2 For all Contracts for supplies and/or services exceeding ten thousand dollars (\$10,000), Contractors must comply with the requirements of federal executive order no. 11246, as amended, R.I. General Law § 28-5.1-10, and other regulations as issued by the purchasing agent, and administered by the state equal opportunity office of the department of administration.

14.3 By submitting qualifications, Proposals or bids, the firm is attesting to the City that they are an Equal Opportunity Employer.

14.4 Non-compliance with the provisions of this Section will be considered a substantial breach of the Contract subject to penalties or remedies invoked as provided by statute or regulation. Including, but not limited to, being declared ineligible for future Contracts or other sanctions.

NOTE: The General Contract Provisions were developed and issued by the Purchasing Department. These provisions standardize the general requirements for anyone doing business with the City of Woonsocket. The specifications, on the other hand, are the requirements for anyone doing business with a Department of the City on a clearly defined



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project. These provisions may be added to, deleted, or modified at any time, for any reason, as may be in the best interest of the City.



**PLANNING AND DEVELOPMENT
CITY OF WOONSOCKET, RHODE ISLAND**

REQUEST FOR PROPOSALS

Item Description: ONLINE GRANTS MANAGEMENT SYSTEM

Date to be opened: Thursday, September 20, 2023 @ 2:00pm

Issuing Department: DEPARTMENT OF PLANNING & DEVELOPMENT

QUESTIONS

- Please direct questions relative to the bidding process, how to fill out forms, and how to submit a bid to Purchasing Agent Ken Allaire
 - Phone: (401) 767-9269
 - Email: ken.allaire@woonsocketri.org
 - Please use the subject line “**RFP Question #6160**”

Pre-bid Conference

NO PRE-BID CONFERENCE



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BID PACKAGE SPECIFICATIONS

The City of Woonsocket is soliciting proposals for a Grant Management and Online Application Submission System Software.

The City is seeking proposals for either Software-as-a-Service (SAAS) configurations of Grants Management System and associated implementation services for improved grant making efficiencies for members of the public, recipients of funds, and staff.

Contract term desired is for a period of three (3) years with an option for two (2) annual extensions.

The City will award a contract to the lowest and most responsive proposal. Project selection may be subject to federal funding and is at the sole discretion of the City of Woonsocket.

Background

The City of Woonsocket, through its Planning and Development Department, manages a variety of grant/loan awards a year, including receiving applications for funding for the following programs:

- Community Development Block Grant (CDBG)
- HOME Investment Partnerships Program (HOME)
- Emergency Solutions Grant (ESG)
- Lead Hazard Mitigation Program

The Department employs permanent employees to administer and oversee these grant/loan programs. We anticipate there will be approximately 20 additional annual users in the community who will be using the grants management system to apply for funds and manage their projects. We are looking for a “software as a service” Grants Management system to help us oversee and manage the grants/loans our Department receives and/or distributes. Elements of this software shall include web-based:

- Application Forms & Tracking for Incoming Applications
- Evaluation Forms & Tracking for City Staff and Review Committee Members
- Reporting and Recordkeeping for each Award (ability for awardees and staff to attach documents and collect information)
- Contract Creation (Software would collect and fill award information into a contract template)
- Monitoring Report Creation (software would collect and fill award information into monitoring letter template)
- Ad Hoc Email/Letter Creation (software would fill in information into a letter template)
- Other relevant functions, as defined in this RFP.

Technology Environment

The Department is located at 169 Main St., Woonsocket RI and houses all staff. The office is networked to the City and has Internet access.



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Apex Technology Group maintains the computing environment for city offices. The city has standardized Microsoft technologies.

Project Timeline

The City of Woonsocket would like to achieve the following schedule:

Activity	Tentative Timeframe
Testing/Interviews with Prospective Vendors	Within 2 Weeks of RFP Submission
Awarding & Contracting with Selected Vendor	Within 4-6Weeks of RFP Submission
Start Build Out of Site	Within 2 Weeks of Contract Signing
Complete Site & Achieve Full Functionality	Within 6 Weeks of Contract Signing
Onsite Training for City of Woonsocket Staff	Within 8 Weeks of Contract Signing
Ongoing Support and Modifications	As needed (within Contract Parameters)

Project Scope

The City is seeking proposals from qualified vendors to provide a complete grant management solution from grant application tracking and submission assistance to grant management and agency reporting to meet the following minimum needs:

Online Applications

The City of Woonsocket is requesting proposals for a system that:

- Allows non-for-profits, businesses, homeowners, developers, and other community stakeholders to submit applications for funding online.
- Has customized online application forms with City of Woonsocket seal.
- Include file uploads, drop-downs, checkboxes, and text fields in application fields.
- Allows applicants to login, save their application, and return. Multiple persons for an applicant agency may login and work on one or more applications.
- Allows applicants view their status online.
- Provides fields that will automatically calculate certain items (like “Total” of expenses).



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- Allows the City of Woonsocket staff to update and create new online applications without additional charges.
- Generates alerts to City of Woonsocket staff when key documents are uploaded or completed.
- Supports multiple application stages, including a Letter of Intent stage, a more detailed proposal stage and as many other stages as needed. Automatically pulls data from online applications into the core grants management system—no download or upload of data files is required.
- Carries over some data for an organization or grant from one application form to another—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- Both applicant and grant maker can quickly and easily reset lost credentials. Applicants can reset lost credentials online through email or security questions.
- Allows the City of Woonsocket to customize a confirmation message to be sent upon submission of an application.
- Will automatically generate warnings based on grant criteria (such as no more than ____% can be spent on salaries, HUD Income Limits, etc.).
- Automatically saves data intermittently throughout a web session in case of system crash, or at a minimum prompts user to save data regularly.
- Provides "character counter" in size limited fields, so that the end user is aware of how much space is left in the field.
- The system should provide a method for electronic signature or certification of submitted documents.
- The system should allow for multiple, sizeable attachments to be uploaded by the applicant to a grant application as a PDF (such as annual agency audit reports & bylaws).
- Once submitted, the system should be able to prevent further modifications to an application or other submission, unless approved by an administrator (date/time stamps for revisions would be ideal).
- The system should provide confirmation/acknowledgement that an application or report was received or successfully submitted.

Internal Tracking

The City of Woonsocket is requesting proposals for a system that:

- Can track a grant award by name, request amount, and organization and other associated information.
- All information for each grant project is linked together through its entire lifecycle.



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- There should be basic data integrity checks, and the system should provide opportunities for applicants/grantees to make corrections.
- Can easily retrieve grant information and status.
- Allows for easy attachment of external documents to a grant record, with interfaces for both grantees and City Staff.
- Permits the City to define custom categorization codes for searching, tracking, and reporting, including but not limited to:
 - Year
 - Grant Type
 - Geographic Code
 - Population Code
 - Grantee Name
 - EIN
 - Application ID
 - Census Tract
 - Project Address
- The system stores attached documents in the database as objects rather than links OR the system uploads attached documents to the server and stores a link to that uploaded file in the database.
- Automatically saves data intermittently throughout a web session in case of system crash, or at a minimum prompts user to save data regularly.
- The system should provide a method for electronic signature or certification of submitted documents.
- Allows for tracking of multiple awards to a single grantee with different durations and reporting requirements.
- Has the ability to generate reports on "missing" documents (grantee has failed to submit) for a given time period.
- The system will be configured to provide secure access to grantees and to prohibit unauthorized users from accessing information in the system.

Application Review

The City of Woonsocket is requesting proposals for a system that:

- Permits multiple reviewers to each numerically rate an application on a number of different factors, and add comments.
- Supports different information or scoring schemes for different programs.
- Supports online viewing and reviewing of applications, letting reviewers see each other's comments and grades. Provides spell-check for reviewers.



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- Permits reviewers to view numeric review scores and report them as summary statistics—for example, average score.
- Proposal owner and management staff can be automatically notified when reviews are completed.
- Allows the City to define automatic steps and rules, or “workflow,” for the grants review process.
- Enables reviewers to easily print grant summaries.
- Provides a stripped down “portal” interface to allow reviewers to see and review grant applications without navigating the full grants management interface.
- Supports checklist functionality to define what information or documents you require from prospective grantees. OR, provides strong online application functionality, including the ability to reopen online applications once they’ve been submitted if more information is required from the applicant.

Budgeting

The City of Woonsocket is requesting proposals for a system that:

- Can track budgets in hierarchically defined categories or program areas.
- Will automatically generate warnings based on grant criteria (such as no more than ____% can be spent on salaries).
- Allows for grantees to submit budget revisions (which than are reviewed and approved by City staff)
- Allows staff the ability to create self-calculating formulas that cannot be altered by grantees.
- Allows for ongoing budget revision after the grant award.

Reporting

The City of Woonsocket is requesting proposals for a system that:

- Permits searching or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- Supports ad hoc reports within the system, which can include custom data columns, datasets, sorting, grouping, logos, and headers.
- Virtually all system data—including the data entered into online applications, review forms, and grantee progress reports, if supported—can be included in reports.

Roles and Permissions

The City of Woonsocket is requesting proposals for a system that:

- Permits the City to define user or group permissions on a field-by-field basis.



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- Provides “dashboard” views that summarize the grants and tasks currently relevant to each individual user.
- Allows the City to assign tasks, such as the review of a progress report, to particular users through workflow functionality.
- Provides a standard focused, roles-based view for management and allows the assignment of tasks to users based on rules and roles.
- Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- Allows the City to grant individuals granular access to view, edit, or delete data for a wide variety of system functions.
- The system must be easy for staff to customize, without intervention from a vendor or technical staff, minimally in the following ways:
 - Modify or create new fields for data capture
 - Modify or create new online forms
 - Modify or create new reports
 - Add/remove/modify users at each permission level

Training & Technical Support

The City of Woonsocket is requesting proposals from a vendor that:

- Provides onsite and in-person training at project startup for all City Staff (approximately 5-10 persons)
- Develops or provides a User Manual for City of Woonsocket outlining all system functions.
- Develops or provides a draft User Manual for recipients outlining all system functions, which can be modified by City staff and distributed to potential applicants.
- Provides ongoing support and technical assistance throughout the term of the contract.
- The ability to scan, save and download documents.



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VENDOR SUBMISSION

To be considered responsive, a proposal must contain the following, prefaced by a table of contents, referenced by number and in the order below:

1. A brief description of the history and organization of the bidder's firm, and of any proposed subcontractor.
2. A written description of the features and functionality the vendor proposes for the grant management system. Vendors are encouraged to be clear and concise and to avoid overly complex technical discussions or a heavy reliance on jargon. Please include a general description of the techniques, approaches and methods to be used in completing the project.
3. Vendors should submit a one page "Blue print" of the system architecture showing all system components and all system levels, including minimum network communication throughput requirements.
4. Vendor shall also list its experience in terms of the development and delivery of the system specified. The list should include at a minimum the following information; years involved in the industry, key customers and the size and type of systems delivered within the past five years, and performance criteria for those systems.
5. Vendor shall also list the programming language(s) used to write the software application and its capabilities in the following areas: service support, on site, via telephone, and via Internet, key personnel with level and type of experience, and local support staff, if any.
6. A list of all system implementation stages. From project commencement through testing, acceptance, training, warranty, and maintenance.
7. Vendors shall provide application security documentation, including public Internet and city network access, email communication and integration.
8. Qualifications, background and experience of the project director and other staff proposed to work on the project.
9. References: A description of at least three (3) similar projects completed by the bidder within the past three (3) years. Include personal references with contact information for each.
 - a. Please provide at least three (3) customer references from clients where you have completed and/or are scheduled to deploy a system similar to what is specified herein. As part of the evaluation process described below, City of Woonsocket officials may be interested in seeing live demonstrations of the product in use by current clients.

Vendor will supply the following information with its customer references:

 - i. Company name
 - ii. Address
 - iii. City, State, Zip
 - iv. System installed
 - v. Software version
 - vi. Hardware platform
 - vii. Date of system installation or anticipated date of installation
 - viii. Contact (name and title)



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- ix. Phone number
10. A detailed cost proposal, including, separately as appropriate: licensing, implementation, software customization costs and training. There must be a line for “Total Contract Cost” which shall include implementation costs for all licenses, hardware, software, hosting, training, and labor/service-oriented items required to deploy the hardware and software components of the system.
11. Recommendations and estimated costs for third-party supplies and hardware, which will be purchased directly by the City.
12. Data Confidentiality-Vendors must answer the following questions in their response to this RFP:
- a. What is the vendor’s records retention policy?
 - i. Meaning, if an individual user deletes a comment or task, is an individual Woonsocket RI user or administrator able to recover that data and for what period of time?
 - ii. If not, is the vendor able to recover that data and for what period of time?
 - b. Is there an ability to archive data/records indefinitely?
 - c. What can an individual user delete?
 - d. What type of visibility and/or access does an administrator have with respect to individual accounts?
 - e. What type of visibility and/or access does the vendor have with respect to individual accounts?
 - f. When, and under what conditions, does the vendor have the ability to access woonsocketri.org accounts and their content?
 - g. Does the vendor index user content and sell or share data, metadata, or keywords with third parties?
 - h. What notice will the City receive prior to any changes of terms in service, particularly with respect to the questions/issues outlined above?
 - i. What opportunity would the City have to decline the proposed changes?
 - j. What is the process for the City to close its vendor accounts and extract all data?
 - k. Does the vendor retain data from closed accounts?

Submission Requirements Format Summary

1. Two (2) complete hard copies, each in a 3-ring binder, plus one (1) additional electronic copy on a USB flash drive must be submitted. Each set should include all attachments requested, including copies of any attachments.

Proposals that fail to address each of the submission requirements above may be deemed non-responsive and will not be further considered. The City of Woonsocket, solely upon its own discretion, will judge vendors on their overall compliance, and may judge a vendor to be materially compliant, even if that vendor is non-compliant with a particular requirement of the RFP.

Evaluation Process

An evaluation team will review, in detail, all proposals that are received.

Following the initial review and screening of the written Proposals, using the selection criteria described below, several bidders may be invited to participate in the final selection process, which may include participation in an oral interview and/or submission of any additional information as requested by the City of Woonsocket.



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The City of Woonsocket reserves the right to determine the suitability of proposals on the basis of a proposal's meeting administrative requirements, technical requirements, the review team's assessment of the quality and performance of the equipment and services proposed, and cost.

During the evaluation process, the City of Woonsocket may require a bidder's representative to answer questions with regard to the proposal and/or require certain bidders to make a formal presentation to the evaluation team. The City of Woonsocket may also have discussions with those bidders falling within a competitive range, request revised pricing offers from such bidders, and make an award and/or conduct negotiations thereafter.

This Request for Proposal does not commit the City of Woonsocket to awarding a Contract. Bidders shall bear all costs incurred in the preparation of the Proposal and participating in the Proposal evaluation process. The City of Woonsocket reserves the right to reject any and all Proposals, to accept the Proposal it considers most favorable in its sole discretion, and to waive minor irregularities. The City of Woonsocket further reserves the right to seek new Proposals when such procedure is considered by it to be in the best interest of the City of Woonsocket.

The following criteria will be used in reviewing and comparing the proposals and in determining bidder capacity.

Evaluation Criteria	Weight
Responsiveness to and compliance with the RFP and submission requirements. Ability and reliability of the software (both system and application) to meet the functional requirements defined in this RFP.	20%
The technical ability, capacity, and flexibility of the bidder to perform the contract in a timely manner and on budget, as verified by, e.g., the quality of any demonstration, client references, demonstrated success in projects with similar requirements and any other contracts with the City of Woonsocket	20%
The reasonability of the cost of the proposal solution. Costs should be itemized by type to allow the City of Woonsocket to implement the solution over the term of the contract.	25%
Vendor reputation from reference accounts or installations similar in scope and nature to the needs of the City of Woonsocket (references which can be contacted and/or visited) and from all written responses to the RFP.	10%
Support and service options including, but not limited to, on-line help, technical support options, documentation types and manuals, and system customization capabilities.	20%
Growth potential of the solution to accommodate future enhancements.	5%



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All qualified proposals will be evaluated based on the Submission Requirements and Cost, with the top candidates (those scoring at or above 60%) advancing as finalists and receiving a full evaluation as outlined above.

Award and Execution of Contract

The City of Woonsocket reserves the right to have discussions with those bidders falling within a competitive range, and to make an award or conduct negotiations thereafter.

Subject to the City of Woonsocket's right to reject any or all proposals, the Department will select a winning proposal subject to approval by the City Council. Upon selection, the City of Woonsocket and the selected Vendor will enter into good faith contract negotiations.

No contract or agreement, express or implied, shall exist or be binding on the City of Woonsocket before the execution of a written contract by both parties. If agreement on the terms of such a contract cannot be reached after a period deemed reasonable by the City of Woonsocket in its sole discretion, the City of Woonsocket may enter into negotiations and sign a contract with any other bidder who submitted timely, responsive and responsible proposals to this RFP.

If, after the City of Woonsocket and the vendor agree to terms and execute a contract, that contract is terminated for any reason, the City of Woonsocket may, in its sole discretion, either enter into negotiations with the next highest scored bidder or issue a new RFP and begin the proposal process anew.

Where written notice is required in this RFP, the notice must be sent by U.S. mail and either facsimile or e-mail.

SUPPLEMENTAL INFORMATION

If the issuing department for this RFP determines that your firm's bid is best suited to accommodate their need, you will be asked to provide proof of the following prior to formalizing an award.

An inability to provide the outlined items at the request of the department may lead to the disqualification of your bid.

This information is NOT requested to be provided in your initial bid that you will submit to the Purchasing Department by the "date to be opened" noted on page 1. This list only serves as a list of items that your firm should be ready to provide on request.

You must be able to provide:

- Business Tax ID will be requested after an award is approved by the Board of Contract and Supply.
- Unique Entity Identifier (UEI) Number will be requested after an award is approved by the City Council.
- Proof of registration at www.sam.gov.
- W-9 Tax Form



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We, the undersigned, submit this Proposal and agree to all the terms and conditions, including

The person signing this Agreement below represents that he/she intends to and has the authority to bind his/her respective Party to this Agreement. (whatever language you want to place here)

COMPANY NAME:	
ADDRESS:	
CITY, STATE,	
ZIP:	
PHONE:	
PRINT NAME:	
SIGNATURE:	
DATE:	