



PROCUREMENT SERVICES

CITY OF SURREY, SURREY CITY HALL
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ADDENDUM No. 1

REQUEST FOR PROPOSAL No.: 1220-030-2023-051

TITLE: SOFTWARE, GRANTS MANAGEMENT

ADDENDUM ISSUE DATE: JANUARY 12, 2024

CLOSING DATE AND TIME: ON OR BEFORE THE FOLLOWING DATE AND TIME (THE "CLOSING TIME"):

TIME: 3:00 P.M. (LOCAL TIME)

DATE: JANUARY 24, 2024

INFORMATION FOR PROPONENTS

Proponents are advised that Addendum No. 1 to 1220-030-2023-051 is hereby issued by the City. This addendum shall form part of the contract documents and is to be read, interpreted and coordinated with all other parts. The following information is provided to answer questions raised by Proponents for the above-named project, to the extent referenced and shall become a part thereof. No consideration will be allowed for extras due to the Proponents or any sub-contractor not being familiar with this addendum. This Addendum No. 1 contains three (3) pages.

QUESTIONS AND ANSWERS:

- Q1. Is the plan for the solution to be just for individuals or organizations as well?
A1. Organizations as well as individuals should have the ability to use the solution.
- Q2. Will there be a custom form for each department?
A2. Not necessarily, the primary intake form is the same but, we will need the option of having a form for every grant, if required.
- Q3. Is there single or multi step approval?
A3. The approval process will likely take multiple steps.
- Q4. How should updates be communicated to applicants?
A4. Up to you to propose, email or via the software would be sufficient. Notifications and communications within the platform are preferred.
- Q5. What is the intended go-live date?
A5. Q3 2024, please see Scope of Services section 3.

- Q6. Could you please elaborate on Req 4006?
A6. Let us know what you could integrate with, this is not a mandatory requirement.
- Q7. Could you please elaborate on Req 2005?
A7. We would like to test new features before they go live to ensure a stable user experience, so this is desired functionality.
- Q8. Could you please elaborate on Req 2007?
A8. This is simply a statement of our office environment; our standard desktop platform is Windows 10.
- Q9. Could you please elaborate on Req 2008, MS 365 specific programs?
A9. This is simply a statement of our office environment; standard Office 365 for our internal users.
- Q10. Has a budget been identified?
A10. The City will not be releasing any budget information relating to this project at this time.
- Q11. What are the requirements for service credits?
A11. We do not have a standard, so please propose what you believe is reasonable.
- Q12. Could you please elaborate on Req 4015, trend micro requirements?
A12. This is simply a statement of our office environment. No requirement to have it on your end.
- Q13. Expected volume? And users
A13. Historically, between 150 applicants and 250 applications annually, however we expect this to grow. Roughly 40 grant administrator users.
- Q14. Unit 4 already has a grant management how come not using it?
A14. We have no current solution and are open to solutions.
- Q15. External user log in? integrated to AD/Azure?
A15. The solution should have its own user management capability for applicants. Azure AD integration would be for internal (administrators, reviewers) user identities.
- Q16. Is the City open to a joint response?
A16. Preference is Prime and listed sub-contractors.
- Q17. Is there desired visibility and interaction for external reviewers/panels to offer expert opinions and/or validation on the application pool?
A17. Please see Req 1041 – Solution allows External reviewer/Partner agency to view applicable grant applications and make comments within the solution.
- Q18. Roughly how many types of automated email communications are sent to applicants/grantees?
A18. Undetermined at this point, applicants should be notified of any progress in their grant application.
- Q19. Roughly how many documents/templates will need to be generated in the system (e.g., grant agreement, payment letter, etc.)?
A19. There is no requirement for system-generated documents from templates. However, any features that help automate tasks for grant administrators can be described in the proposed solution. Looking at functional requirements 1039, 1043 and 1062, it is desirable that grant administrators should be able to control the format/branding of the messages, emails and notifications sent by the solution. Controlling the PDF export of the grant application as a record is also desirable.
- Q20. Do you have any standard reports that need to be created on a regular basis (e.g., Grant Approval List, List of Approved Grants, List of Payments, etc.)?
A20. Yes. There will be standard reports to be generated on a regular basis. Additionally, the solution should allow custom reports creation.

- Q21. Do you currently use any advanced reporting/analytics software (such as Tableau, PowerBI, Qlik, etc.)? If yes, do you plan to continue to use this type of software going forward? If not, is there an interest in pursuing this option?
A21. Please describe built-in reporting capabilities provided by the proposed solution, as well as the possibility of exporting data or integrating via APIs with third-party reporting solutions.
- Q22. Which systems must be integrated with our platform at launch? Do they have APIs available for integration?
A22. The only planned integration for launch would be Azure AD for internal user identities (administrators, reviewers). We would like to explore a possible integration with Unit4 Agresso for financial information, but that would be at a later stage. API integration with third-party reporting solutions would be another possibility, but there should be other methods to access grant application information (e.g. data export).
- Q23. To better understand compliance for this specific agreement, what levels do you require regarding State and Federal data security and accessibility for cloud-based SaaS offerings?
A23. Please see Schedule C-3-1
- Q24. Could you please provide the current grant application form.
A24. Please see <https://www.surrey.ca/about-surrey/grant-programs> and attached grant form for reference.
- Q25. Does your agency manage more than 5 grant programs across different teams?
A25. See answer A23.
- Q26. Would you prefer an ala carte subscription per program that can go up and down, or prefer to pay an annual base subscription for all of your programs?
A26. Please propose the option that you believe will best suit our needs.
- Q27. Do you need to process loans or investments as part of the grant system?
A27. This is not required.
- Q28. Would a train-the-trainer approach and online LMS meet the requirements for training strategy, training plan, materials, etc.?
A28. Please see Scope of Services, section 2, Training and Change Management.
- Q29. Will you need to process large amounts of data automatically without staff running a report or taking action within the system? Also, do you need to calculate complex equations quickly to support grant processing?
A29. All function requirements are listed in the Functional Requirements tab of Schedule C-3-1. If your proposed solution includes these capabilities as mechanisms to support these functional requirements, please describe.

All Addenda will become part of the Contract Documents.

- END OF ADDENDUM -