County of Los Angeles
Regional Park and Open Space District

Request for Information (RFI)
No. 2017.1

Enterprise Grants Management System for the Los Angeles County Regional Park and Open Space District

http://RPOSD.lacounty.gov
http://ParksProjects.lacounty.gov

July 2017
1.0 PURPOSE
The Los Angeles County Regional Park and Open Space District (RPOSD), a California Special District operating as an independent, grant-making agency of the County, is releasing this Request for Information (RFI) to obtain information from companies that provide a modular, cloud-based, enterprise-class online Grants Management System (GMS) for grant-making agencies and organizations. RPOSD is surveying the market for companies that provide software and the services described in this RFI.

2.0 BACKGROUND
RPOSD was created by voter-approved Proposition A – the Safe Neighborhood Parks Act – in November, 1992. Proposition A provided $540 million in grant funds for the acquisition, restoration, and rehabilitation of property for parks, recreation, and natural lands. An additional $319 million in funding was obtained after voters approved a second measure in 1996. Proposition A authorized RPOSD to levy benefit assessment property taxes to fund grant projects and maintenance, as well as RPOSD administration.

On November 8, 2016, voters approved Measure A, which will provide an estimated $94.5 million annually for park projects and programs starting in fiscal year 2018-19 through a parcel tax levied by RPOSD.

RPOSD currently administers over 1,750 Proposition A grants through its various grant programs and provides maintenance and servicing funds to over 90 individual agencies to maintain their grant funded projects. RPOSD anticipates that the number of grants and grantees to be served by the GMS will grow incrementally as Measure A funding becomes available.

3.0 OVERALL APPROACH
RPOSD seeks to develop an integrated Grants Management System (GMS) that will allow staff, grant recipients, and the public to track submission, award, distribution, and use of RPOSD grants. The GMS is expected to feature the following Fundamental Aspects:

- Enable a paperless granting process that tracks receipt of revenue and the disbursement of funds;
- Be cloud-based and accessible from the worldwide web;
- Include a proven and reliable Application Programming Interface (API), to be compatible with the following:
  - A GIS (Esri-based, etc.) mapping system as a tool for users to view grant data;
  - Los Angeles County’s enterprise Cost Accounting and Purchasing System (eCAPS) which is used to track RPOSD accounts and to issue payments to grantees;
- Include a secure, online grantee portal that interfaces with the grants management application module for data entry, payment submittal, and reporting purposes; and
• Provide grant tracking information that is selectively available to the public without requirement of passwords, either directly or via API.

RPOSD recognizes that some of these Fundamental Aspects will require customization of “off-the-shelf” GMS software and/or customized links among software packages.

The selected vendor will integrate all data from RPOSD’s current systems to the new GMS.

The new GMS shall be configured and setup, and all necessary training and implementation completed, in order to “go live” on May 1, 2018.

4.0 SPECIFIC SERVICES OF INTEREST

Specific services of interest include, but are not limited to, the following:

Basic Parameters

• The GMS shall have a user-friendly look and feel both for internal users and grantees.

• The GMS shall have responsive design that is compatible with multiple operating systems, including and not limited to Microsoft Windows, MacOS, iOS, and Android. Mobile functionality can be provided through a separate application, or through the main GMS website.

• The GMS shall support an unlimited number of users (both internal and external) and transactions.

• The GMS shall support an unlimited number of grant funding programs.

• The GMS shall allow for user roles and responsibilities to be designated at a funding program level, as well as a project level. This includes permissions for RPOSD staff to designate permissions at the document and data field levels.

• At a minimum, the GMS shall include modules for creating requests for proposals; creating, submitting, evaluating, and tracking the status of grant applications; administering grants from contract creation through project close out (including reimbursements); managing individual and organization accounts (including profile and login information for internal and external users); and tracking Measure A revenue and expenditures.

• The GMS shall allow for RPOSD to create and customize forms that allow for the establishment of workflow, conditional formatting rules, and integration of data throughout the system.

• The GMS shall automatically create an annual “tree structure” showing multiple funding categories and shall be able to automatically assign annual funding from total Measure A revenues to each funding category, based on percentage formulas. The GMS shall include the ability to roll up and roll down funding from a high level down to the lowest level, and to allocate funds to grants and/or programs at the lowest level of the structure.
• The GMS shall not allow funding categories to be over-allocated, over-committed, or over-paid.
• The GMS shall include the capability to allow for scheduling of recurring payments, in addition to processing of reimbursement payments.
• The GMS shall include the ability to manage and store documents (electronic, PDFs, etc.) within the system.
• The GMS shall also have versioning capability in order to track historical changes, including, but not limited to, budgets, applications, timelines, amendments, evaluations, etc.
• The GMS shall generate On-Site (Operational) reports, transactional reports, and miscellaneous/ad-hoc reports for internal users and shall include the flexibility to label, tag, and categorize records to facilitate report creation.
  o Report options to allow for exporting to PDF, Microsoft Word, Microsoft Excel, and CSV formats.
• The GMS shall include various role-based dashboards that contain information such as status of tasks, alerts and reminders, and other pertinent information.
• The GMS shall support site visit customizable forms and requirements, including, but not limited to, workflow tracking, alerts and reminders in accordance with the project schedule, coordination between the grantee and RPOSD staff.
• The GMS shall include flexible and customizable alerts to assist RPOSD and grantees with communication, tasks, and deadlines.
• The GMS shall track communications through an integrated searchable log. This means the system shall track communications internal to the system as well as support uploading of external documents and tracking all communication, including, but not limited to, emails, phone conversations, etc.
• The GMS shall support electronic signatures such as Adobe LiveCycle, DocuSign, Adobe, etc.

Location Data

• The GMS shall include the ability to link location data and other jurisdictional information with other modules throughout the system for use in creating interactive maps that are publicly accessible. Data to be mapped may include and is not limited to revenue collected, grants awarded, and project status. Existing project location application is located at http://ParksProjects.lacounty.gov and sample interactive maps are located at http://lacountyparkneeds.org

Service and Support

• Vendor shall provide and support a QA/Test environment to validate all system configurations, including migrated legacy data, prior to final implementation.
• Vendor shall provide information and resources that users can consult for answers to frequently asked questions and to troubleshoot common issues. The information and resources can include, and are not limited to frequently asked
questions, knowledge bases, and self-paced tutorials. The resources shall include a help desk phone number, and a Help Desk email contact for use by RPOSD staff and grantees when in need of service. The Help Desk shall be available to provide support during County business hours (Monday-Friday, 8:00am to 6:00pm PST) and shall allow users to leave a voice or email messages after business hours. The Help Desk shall provide immediate email responses and call backs with 24 hours.

- Vendor shall provide a designated Implementation Specialist and related Technical/Training Specialists to assist with the implementation and configuration process.
- Vendor shall provide a designated Account Manager that RPOSD can contact directly for any necessary support and assistance after implementation is complete.
- Vendor shall conduct formal training for all RPOSD staff in a manner that allows RPOSD to use the GMS efficiently and effectively once training is complete. Suggested training topics include, and are not limited to, System Configurations, Administrator Functions, Internal Users/Operators, New Departments/Agencies, and Training Materials.

**INFORMATION REQUESTED**

RPOSD requests responses to this RFI that contain the following information:

4.1 Describe the primary proposed vendor and its experience in providing the services described in Sections 3 and 4 of this RFI, including the number of similar projects the vendor is currently providing to other clients.

4.2 Describe any partner or subcontractor vendors who will assist the primary vendor on this project, their role(s), and their experience in providing the services described.

4.3 Describe the staff members who will have primary roles on the project, both in direct interface with RPOSD staff and in customizing software where required, and their qualifications and experience in fulfilling their proposed roles.

4.4 Describe which items identified in Sections 3 and 4 of this RFI are contained in the vendor’s “off-the-shelf” software, and which will need to be customized. For items that need to be customized, please provide an overview of an approach to customization and any partner companies that will be involved.

4.5 Describe the proposed software solution(s) and their administrative aspects. Include screen shots showing the user interfaces where appropriate.

4.6 Provide flowcharts or similar graphic showing:

4.6.1 The workflow for entry and administration of grants under the GMS.
4.7 The suggested roles and responsibilities between the RPOSD and vendor for every stage of the process of the implementation of the GMS software. Describe the availability of and procedures for providing ongoing support, maintenance and updates, and the associated costs.

4.8 Provide an overview of how your firm would monitor, mitigate, and address any cyber risks associated with implementing your software application with RPOSD services.

4.9 Provide a description of your firm’s current policies and practices regarding your software application, including fee structure.

4.10 Provide a proposed implementation schedule that achieves release of fully vetted and functional GMS to live on or before May 1, 2018.

4.11 Include at least three (3) references, including contact information, from current or previous enterprise level clients. Previous clients must be from work completed within the last 3 years.

5.0 EVALUATION CRITERIA AND PROCUREMENT PROCESS

RPOSD expects to evaluate the responses to this RFI that it receives, and to inform its procurement process based on these responses. RPOSD may also hold interviews of one or more vendors at its discretion.

Responses to this RFI and any subsequent interviews will be evaluated by RPOSD staff based on the following criteria:

- Ability to fulfill the criteria outlined in Sections 3 and 4 of this RFI.
- Vendors' past experience, qualifications, and references.
- Vendors' experience working with any other proposed or needed team members.
- Apparent costs for both implementation and on an on-going basis.
- “Fit” between RPOSD and vendor staff.
- Ability to release fully vetted and functional system to the public by May 1, 2018.
6.0 SUBMISSION INSTRUCTIONS

Responses to this RFI are to be delivered in person, sent via United States Postal Service or commercial express carriers. **Responses to this RFI are due on or before 12:00 noon (Pacific Time), August 17, 2017.** Late submittals may be accepted at RPOSD’s sole discretion. Please mark the package: “LA County Regional Park and Open Space District Administration Section.”

The original Response to the RFI, two (2) numbered copies, and a CD/DVD containing all portions of the Response to the RFI, including PDF and any applicable multimedia files, are requested to be enclosed in a sealed envelope or box, plainly marked in the upper left-hand corner with the name and address of the Respondent.

Mailing Delivery Address:

Los Angeles County Regional Park and Open Space District
Administration Section
510 S. Vermont Ave.
Los Angeles, CA 90020
Attn: Warren Ontiveros

Electronic Delivery Address (in addition to mailing): send documents and/or a link to cloud-based storage (e.g. OneDrive, Google Drive, DropBox) to:

Warren Ontiveros
wontiveros@parks.lacounty.gov
7.0 OTHER NOTICES

7.1 Information received in response to the RFI may be used by RPOSD for planning purposes. Vendors are advised that RPOSD reserves the right to use any information gathered in response to this RFI to develop future solicitations.

7.2 This RFI does not commit RPOSD to contract for any services whatsoever. RPOSD shall not be liable in any way or have any responsibility for any costs incurred in connection with the preparation, submittal, or presentation of any response to this RFI.

7.3 Responses to this RFI shall become the exclusive property of the RPOSD. Responses to this RFI become a matter of public record, with the exception of those parts of each proposal which are justifiably defined as business or trade secrets, and, if by the proposer, plainly marked as "Trade Secret," "Confidential," or "Proprietary."

7.4 The RPOSD shall not, in any way, be liable or responsible for the disclosure of any such record or any parts thereof, if disclosure is required or permitted under the California Public Records Act or otherwise by law. A blanket statement of confidentiality or the marking of each page of the proposal as confidential shall not be deemed sufficient notice of exception. The Respondents must specifically label only those provisions of their respective proposal which are "Trade Secrets," "Confidential," or "Proprietary" in nature.