

Project title: Authorize the Mayor to Sign Contract Amendment #2 to Request for Proposal #2020-062 Procurement, Contract, and Grant Management to Streamlink Software Inc., dba Amplifund

Council Bill # *interoffice use*

Agenda dates requested:

August 3rd, 2022

Briefing

Proposed action

Consent

Action

Ordinance

Public hearing

Yes No

Budget amendment:

Yes No

PowerPoint presentation:

Yes No

Attachments:

Contract Amendment #2

Department(s) involved:

Procurement, Community Development, & Information Technology

Contact person:

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Initialed by:

Department head

Administration

Council President

Project: Request for Proposal #2020-062

Partner/Supplier: Streamlink Software Inc., dba Amplifund

Location:

Preceding action: 2/17/21 Multi-Contract Award to Perfect Commerce LLC: A Proactis Company and Streamlink Software Inc., dba Amplifund
7/14/21 Contract Amendment #1 to Streamlink Software Inc., dba Amplifund

Fund: 505

Fiscal summary statement:

The change order requires 80 additional implementation service hours at \$175 per hour. The total cost is \$14,000. The cost is non-taxable as it is professional services.

Following Procurement Policy Section 1.9.9, contract amendments will ordinarily be awarded in the same fashion as the original contract. As Council originally awarded the contract in February 2021, the amendment is being submitted for Council approval.

Project summary statement:

The grant management system is an online cloud-based software that includes grant management, monitoring, reporting, electronic signature, routing, and performance tracking for pass-through grants awarded by Community Development. Currently, the system monitors only the City's municipal awards.

Contract amendment #2 is for human needs custom reports, the set-up and configuration of the City's Federal and State Grants, and the adjustment of the City's subscription from Amplifund Grant Seeker Advanced to Amplifund Lifecycle.

The software will be customized to monitor more funding sources and increase the transparency of accomplishments and fund spend-down. Additional scope of work will also implement the use of information through the City's existing open data portal.

Upgrading to the Amplifund Lifecycle subscription will expand the software for additional departments to use in applying for grants and monitoring awards.

Recommendation (exact action requested of Council):

Authorize the Mayor to sign Contract Amendment #2 for a total of \$14,000 to Request for Proposal #2020-062 Procurement, Contract, and Grant Management to Streamlink Software Inc., dba Amplifund.

Change Request Form

Project Information

Customer	City of Everett ("COE")
Project	AmpliFund Implementation – Federal and State Programs
Customer Project Manager	Dorothy Claymore
AmpliFund Project Manager	Elvira Makarevich
Change Name	Subscription and Scope Change
Date Submitted	07/06/2022

This change request is for Human Needs Custom Reports, the set up and configuration of COE's Federal and State Grants, and the adjustment of COE's subscription from AmpliFund Grant Seeker Advanced to AmpliFund Lifecycle

Change Impacts

Impacted Element	Yes	No	Description of Change Impact
Subscription	X		Updating to Lifecycle Advanced for no charge
Objectives / Scope	X		Scope described in this SOW
Project Milestones		X	
Deliverables		X	
Cost	X		Additional 80 implementation services hours
Other		X	

Cost Estimate

Cost Estimate Detail	Estimated Cost
Additional 80 implementation services hours @ \$175.00 rate	\$ 14,000.00
Total Change Order Cost Estimate	\$ 14,000.00

Additional Services Hours Notes:

- 50 hours allocated to complete the items listed in this Scope of Work.
- 5 hours allocated for AmpliFund to host one (1) Applicant and one (1) Recipient training.
- 25 hours allocated as a buffer to use for this scope of work, or any other implementation work needed by the City of Everett in the future. Hours expiration will align with contract renewals and will be extended as necessary to be used over multiple years.
 - AmpliFund will provide monthly service hourly reports

Customer Reviewer Approvals / Status

Customer Approval	AmpliFund Approval
Approver Name: _____	Approver Name: _____
Approver Role: _____	Approver Role: _____
Approver Signature: _____	Approver Signature: _____
Approved Date: _____	Approved Date: _____

Statement of Work

City of Everett (“COE”)

The statement of work is as follows and will be included as part of the Change Request for the implementation of the Human Needs Custom Reports, the set up and configuration of their Federal and State Grants, and the adjustment of their subscription from AmpliFund Grant Seeker Advanced to AmpliFund Lifecycle.

Human Needs – Custom Reports

Goal to use for future grants:

- Accomplishment of Persons Served
 - Can be adapted from the existing Recipient Performance Plan Detail Report
 - Fields to be included: Agency Name, Award Program Name, Award Amount, Expenses to Date, and Achievements to Date; pulled from submitted and approved Payment Requests and the related closed reporting period for both expenses and achievements.
 - Does not include expenses that are not attached to a Payment Request and does not include achievements not tied to funds expended to support those services.
 - AmpliFund anticipates that this can be complete in 1-2 reports, with a preference for a single report.
- List of agencies awarded and amounts
 - Will be adapted from the Opportunity Fund Standard Report
 - Summary listing, not dependent on the expense reports/payment requests submitted; similar to the “Award” landing page list, but in report/Excel form.
 - Fields to be included: Funding Source, Lead Recipient, Award Name, Total Awarded Amount, Description. Filtered by Fund name.
- Priorities by Funding Report
 - No existing report that could be built from.
 - Provide data in an excel format to be manipulated out of the system.
 - Fields to be included: Agency Name, Award Program Name, Award Amount, Award Details, and Priority (custom field, non-global).
 - Currently using “Award Details” field for DVS, SCLS, and ChildStrive to categorize by “Funding Priority – (housing/homelessness/services).
 - AmpliFund created a custom field “Funding Priority”, non-global on the Award for the same purpose. Will use this field to sort each award into separate priorities.
 - The options on this multiple-choice field will change every year. AmpliFund will create/update the “Funding Priority” custom field as part of annual subscription. Solicit the change by submitting a Support Ticket to support@amplifund.zendesk.com.

Scope of Grant Management – Federal and State Programs

Rollout expectations

- Training City of Everett's Staff
 - Grant Management module in AmpliFund, including Analytics dashboard as a Recipient of grant funds with multiple funding sources. (For example, CHIP Program tracking for Program Income and Entitlement Funds.)
 - As part of this SOW, will change City of Everett's subscription to be a Lifecycle Advanced that will include the Grant Management module.
 - Program Income will be fully scoped during a requirement gathering session. Existing AmpliFund functionality will be utilized to manage this in the system. Options will include: awards, custom forms/fields, expenses etc.
 - Federal budget tracking for subrecipients/subawards, including multi-year tracking and personnel/benefit tracking for federal labor standard compliance.
 - Risk Configuration/Monitoring for awards.
 - AmpliFund will leverage recorded trainings from Support site to fulfill this requirement, and for a more efficient use of service hours.
- Award Tracking
 - Establish grant workflow for pre-award process for federal/state awards to track NEPA compliance measures, monitoring efforts, debarments, etc.
 - Align required performance measures tracked in federal and state systems with AmpliFund Performance Plan functions.
 - Refer to Exhibit E – CDBG quarterly PS Report (output formatting is flexible)
 - Leverage AmpliFund Custom Forms to capture data, as it exists today.
- Reporting
 - Utilize existing custom reports established for Human Needs funds to produce similar annual and point-in-time reporting for funds expended, accomplishment reporting, priorities, etc.
- Training for Federal & State Applicants/Recipients
 - Hold applicant and awardee training for federal and state funds, similar to Human Needs effort.
- Application
 - Publish and launch Community Development Block Grant (CDBG), HOME Program (HOME), and State 2060 Affordable Housing Trust Fund (AHTF) applications no later than September 30, 2022. Application to be open 1 month minimum.
 - Application will be configured against signed off on requirements between August 1-September 30, 2022. Both City of Everett staff and AmpliFund will be required to work together to advance the timeline. This includes the provision of adequate requirements, participation in review processes, and testing of application.
- Review/Scoring process
 - Establish vetted scoring/review method and process prior the launch of applications.

Background Notes:

Federal Program – CDBG, HOME

- General application process
 - 20% - Direct allocation, administrative costs
 - 15% - Public services, similar to human needs
 - 65% - Nonpublic service programs
 - Everything but admin is all competitive – Same application and review than human needs
- Finances
 - Currently: Complex excel budget, FOR NON-PUBLIC SERVICE ONLY: Combined Funder Application (Pre-Award budget)
 - COE would like to track a Master budget for CDBG in AmpliFund as a direct award recipient, use the ability to break down in multiple years, track time and wage, and track reimbursements.
 - L&I system is used to track weekly payrolls for Non-Public Service projects.
 - They would like AmpliFund to track how many hours staff worked and at what rate, track personnel expenses, and be able to reconcile L&I with AF's master budget.
 - Program income – Currently have an internal tracking document for one award, significant amount. Would like to track spend down in AmpliFund with multiple funding sources for one award/activity.
- Reporting
 - Programmatic: Reported on Federal system IDIS. Standard monthly/quarterly reporting. Please refer to CDBG documents **Exhibit E** (one for Public Service and another for Non-Public Service) and **Exhibit F**.
 - Annual monitoring*: Will include agencies accomplishments submitted. Count of people, demographics, households. Please refer to **Monitoring Checklist** document.
 - Award Agreement: Might need another version for CDBG
 - Snapshot of spend down progress would be a nice to have
 - Accomplishments: Nice to have, need more requirements gathering. COE not sure how would translate to capital projects because it wouldn't be apples to apples. The easiest would be to upload as an attachment.
 - *COE to share sample reports.
- Recipients
 - Choice limited action. COE will need flexibility and tracking options: grantees will have award activated on July 1, they won't have an award agreement until Sept-Oct.
 - Currently tracked in excel/files, pre-award meetings, notes, emails

State Program - AHTF

Program funding for shelter support, direct allocation to pass through entities. Is similar than Human Needs except for the budget and accomplishments management.

- Application
 - Same timeline as CDBG and HOME
- Budget
 - Breakdown similar to CDBG
 - Indirect: Need to track indirect cost allocation, has to be in the threshold established by state. No need to track cash match.
 - Need to track Program Income.
- Reporting
 - Accomplishment reporting: number of beds occupied; shelter provided
 - State announced reporting will change this year, COE doesn't have the final version of report, but they can share last years.
- Recipients
 - Choice limited action. Similar than federal, but not as strict
 - Usually, the same 3 agencies are awarded by this program, and they are a Human Needs recipient already. No extra training should be required.