



Loudoun County, Virginia

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REQUEST FOR INFORMATION

**INTEGRATED GRANTS MANAGEMENT SYSTEM**

**ACCEPTANCE DATE:** December 15, 2021 Prior to 3:00 p.m., "Atomic Time"

**RFI NUMBER:** RFI 451782

**ACCEPTANCE:** County of Loudoun, Procurement Division,  
Government Center

**PLACE:** 1 Harrison Street, SE, 1<sup>st</sup> Floor  
Drop Box labeled: **Procurement Bids and Proposals**  
Leesburg, Virginia 20175

Requests for information related to this Request for Information should be directed to:

Kathleen Armstrong  
Contracting Officer  
(703) 777-0566  
(703) 771-5097 (Fax)  
E-mail address: [kathleen.armstrong@loudoun.gov](mailto:kathleen.armstrong@loudoun.gov)

This document can be downloaded from our web site: [www.loudoun.gov/procurement](http://www.loudoun.gov/procurement):

IF YOU NEED ANY REASONABLE ACCOMMODATION FOR ANY TYPE OF DISABILITY IN ORDER TO PARTICIPATE IN THIS REQUEST FOR INFORMATION, PLEASE CONTACT THIS DIVISION AS SOON AS POSSIBLE.

Issue Date: November 15, 2021

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**INTEGRATED GRANTS MANAGEMENT SYSTEM**

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Prepared By: Kathleen R. Armstrong  
Contracting Officer

Date: November 15, 2021

## INTEGRATED GRANTS MANAGEMENT SYSTEM (GMS)

### 1.0 Purpose

The County of Loudoun, Virginia (County) on behalf of the Department of Finance and Budget, is issuing a Request for Information (RFI) to obtain information from interested firms that specialize in the implementation of full-grants-lifecycle, commercial-off-the-shelf (COTS) integrated Grants Management Systems.

This RFI is for planning purposes only and is not a Request for Quote (RFQ), Request for Proposal (RFP), Invitation for Bid (IFB) or an obligation on the part of the County to acquire any services. Responses to this RFI are not offers and can/will not be accepted by the County to form a binding contract. The County reserves the right to determine how it should proceed as a result of this notice.

Furthermore, those who respond to this RFI should not anticipate feedback with regard to their submission. The County will not pay any cost incurred in response to this RFI. All costs associated with responding to this RFI will be solely at the responding firms' expense. The information provided in this RFI is subject to change and is not binding on the County. The County will review the responses to the RFI and determine if a formal Request for Proposal (RFP) will be issued.

### 2.0 Background

The County actively participates in grant-seeking and grant-making with several funding agencies through state and federal transactions. In 2020, the County received \$72.5 million in direct or pass-through grants from the Federal government. In recent years, the County has disbursed approximately \$2 million per year to deserving County organizations through its nonprofit grantmaking activity.

Of the County's thirty-seven (37) departments and offices, over half receive external funding beyond local tax dollars. Each department currently manages their own grant applications through a decentralized process which then receives approval from the Department of Finance and Budget (DFB). Grants are submitted either by the department or DFB staff. The County is seeking to formalize processes, increase communication between staff and systems, and omit duplicative data entry. To enhance these areas, the County also expects that project codes and other metadata, notifications and alerts from those systems filter down into the grants management systems. In the grantmaking area, the County has limited capability within its Laserfiche repository system to accommodate some of the grantmaking application workflows; its role in the grantmaking activity will probably be eliminated and replaced by the new system.

The County conducted informational interviews with departmental leaders involved in grant seeking, and grantmaking activities. The interviews produced the following themes:

- A. **Process management.** The grants management system would be a centralized source for tracking and managing the grantee process. This means ticklers, notifications, alerts, deadlines in one source.
- B. **Integration with Oracle Projects & Grants and General Ledger modules.** The grants management system should report current project-management and financial data entered into Oracle. This would include notifications from internal budget approval schedules/systems.
- C. **Prospecting/Search.** The grants management system should function as a clearinghouse for external grants opportunities. It should facilitate focused, relevant searching for new grant opportunities. Many departments expressed a desire to have the system support partnering and collaboration between/among departments.

### 3.0 Statement of Needs

#### 3.1 Business Functions Requirements

The Department of Finance and Budget is interested in procuring a new grants management software system that would be available to all County departments. Find below a summary of general requirements for the system:

- A. **Program Management and Planning.** The envisioned system would feature a centralized program management and planning capability. This would include:
  - 1. Creation of Grantee and Grantor programs;
  - 2. Maintenance of embedded workflows and online applications;
  - 3. Review forms;
  - 4. Memorandum of Understanding (MOU) forms; and
  - 5. Other forms pertinent to the grants process.
- B. **Search and Prospecting.** The envisioned system would facilitate the search for external grant opportunities and would incorporate searches into a prospecting clearinghouse accessible by all system users. These searches should take advantage of system-to-system web-based utilities such as that offered by Grants.gov. Ideally, the system should link the search function to the grants approval process and eventually the grants application and award process.
- C. **Grant Seeking.** The envisioned system should facilitate management of the grant-seeking process. The system should at a minimum offer features that streamline and track activities associated with:

1. Applying for grants;
2. Supplying documentation and other materials to grantors;
3. Award notification; and
4. Invoicing for awarded funds.

System features should also include, where possible, system-to-system integration, such as that offered by <https://www.grants.gov>, with external grantor systems. This integration could include submission of a consolidated Federal Financial Report (FFR) to grantor entities.

- D. **Integration with Internal County Systems.** The envisioned system would feature system-to-system integration with internal County system platforms whenever possible. Integrations would include to the County's Oracle P&G and GL modules, at minimum, and possibly its Accounts Payable (AP) module. Another integration would involve existing Laserfiche repositories containing previously-submitted applications, documents and correspondence.
- E. **Grantmaking.** The envisioned system would support the full grantmaking lifecycle, including:
1. Creation of a secure Grants Portal;
  2. Publishing and accepting applications from external entities;
  3. Internal review and scoring of applications;
  4. Management and notification of awards;
  5. Creation and publishing MOUs and contracts; and
  6. Performance reporting and evaluation.
- F. **Reporting.** When feasible, the envisioned system would produce reports submitted by grantee users to their grants sources. The system would also support the creation of financial and performance reports submitted to internal stakeholders.
- G. **Repository.** The current grants environment utilizes the County's Laserfiche application to store applications and other documentation associated with the grantmaking activity. The envisioned system would replace Laserfiche for certain grantmaking activities and feature a repository, available to all GMS users, that offers access to historical and current grants documentation.

### 3.2 Management Plan/Project Management

The County will require a Management Plan/Project Manager for:

1. Implementation of the software system including design;

2. Engineering;
3. Delivery;
4. Installation;
5. Services; and
6. Maintenance and user technical assistance.

Firms may provide some basic information relative to the RFI response, but a more in-depth response will be expected only with a formal RFP response.

### **3.3 Training**

The County will require on-site training. Firms may provide some basic information relative to the RFI response regarding training options, but a more in-depth response will be expected only with a formal RFP response.

### **3.4 Maintenance Agreement**

Firms may provide some basic information relative to this section with the RFI response, but a more in-depth response will be expected only with a formal RFP response.

### **3.5 System Enhancements and Upgrades**

Firms may provide some basic information relative to this section with the RFI response, but a more in-depth response will be expected only with a formal RFP response.

## **4.0 RFI Response Requirements**

### **4.1 Vendor's Business Information**

- A. Company Name
- B. Primary Contact Name
- C. Organization Address
- D. Contact Telephone Number
- E. Contact Email
- F. Organization Website
- G. Describe the main lines of business at your organization.
- H. Complete, sign and submit Signature Page (Section 6.0)

### **4.2 Capabilities and Background**

- A. Firms shall provide a brief but detailed description of how the Firm would address the requirements described in Section 3, Statement of Needs, with special attention given to the product

requirements described in Section 3.1, Business Function Requirements.

- B. Firms shall provide an overview of the firm's expertise, qualifications and experience relative to implementing Firms' product offering.
- C. The County envisions between 25 and 50 named internal users requiring access to the system, with approximately 25 of those users concurrent. Users would be granted differing rights/permissions in the system, i.e. System Administrator, Technical Writer, Reviewer, etc. There could be as many as 200 credentialed, external applicant-users accessing the online Grants Portal.
- D. Firms shall provide a link to their existing on-line demonstration in order for the County to review some basic characteristics of a proposed system that might better assist the County in determining and educating themselves as to the range of details to ask for in modules, the type of modules to request in an RFP, and the basic features included in the most up-to-date systems of the type being sought by the County.

#### **4.3 Pricing**

No pricing is required at this time, however, the County would like to know the pricing structure offered for this type of system and services whether per person, per user, per product, etc.

### **5.0 Instructions for Submitting RFI Response**

#### **5.1 Preparation and Submission of Responses**

- A. Each firm shall submit one (1) original response and four (4) copies and one electronic PDF copy on a USB Flash Drive (a USB flash drive is not required if response is e-mailed) to the County's Division of Procurement as indicated on the cover of this Request for Information.
- B. All responses shall indicate the RFI number, time and date of opening and the title of the RFI.
- C. Responses must be received by the Division of Procurement **before** the Acceptance Date indicated on the cover of this Request for Information. Requests for extensions of this time and date will not be granted, unless deemed to be in the County's best interest. Firms mailing their response shall allow for sufficient mail time to ensure receipt of their response by the Division of Procurement by the time and date fixed for acceptance of the bids. Responses received by the County after the acceptance date and time will not be considered.

D. Responses may be submitted via email to Kathleen R. Armstrong at kathleen.armstrong@loudoun.gov or

RFI responses may be submitted via one of the following options:

US Mail to:

County of Loudoun, Virginia

Division of Procurement

PO Box 7000

Leesburg, Virginia 20177-7000;

or

Hand delivered to:

County of Loudoun, Virginia

Division of Procurement

1 Harrison Street, S.E.,

**1st Floor, Procurement Bids and Proposals Drop Box**

Leesburg, Virginia 20175.

or

Private carrier (UPS/FedEx) to:

Loudoun County Procurement

1 Harrison Street, S.E.,

**ATTN: PROCUREMENT BIDS & PROPOSALS**

Leesburg, Virginia 20175

Faxed proposals will not be accepted.

Please note: Offerors choosing to submit RFI responses via US Mail or UPS/FedEx should allow at least an additional twenty-four (24) hours in the delivery process to ensure bids are received on time.

E. **Due to restrictions surrounding the COVID-19 pandemic, public access to County facilities is extremely limited. The mailing of RFI responses is preferred. However, if a RFI response is hand delivered, it will be received in the lobby of 1 Harrison Street, SE, Leesburg, VA 20175 ONLY in the Drop Box labeled: Procurement Bids and Proposals between the hours of 8:30 a.m. and 5:00 p.m.**

F. **ALL RFI responses MUST BE SUBMITTED AT THIS LOCATION PRIOR TO 3:00 P.M. on the Acceptance Date of the RFI in order to be considered. RFI responses will not be accepted at any other building locations or after 3:00 P.M. Failure by an offeror to address and label their submission in accordance with the requirements of this section may result in submission being delivered to an incorrect location which will ultimately result in the submission rejection for late submission.**

## 5.2 Questions and Inquiries

Questions and inquiries, both oral and written, will be accepted from any and all firms. However, when requested, complex oral questions shall be submitted in writing. Questions are due to the Division of Procurement by noon on November 19, 2021. The Division of Procurement is the sole point of contact for this RFI unless otherwise instructed herein. Inquiries pertaining to the RFI must give the RFI number, time and acceptance date and the title of the RFI.

## 5.3 Proprietary Information

Trade secrets or proprietary information submitted by an offeror in connection with this RFI shall not be subject to disclosure under the Virginia Freedom of Information Act; however, **pursuant to § 2.2-4342 of the Code of Virginia, the offeror must invoke the protections of this section prior to or upon submission of the data or other materials, and must clearly identify the data or other materials to be protected and state the reasons why protection is necessary. Failure to abide by this procedure may result in disclosure of the offeror's information.** Offerors shall not mark sections of their response as proprietary if they are of a "Material" nature.



## Loudoun County, Virginia

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Division of Procurement  
1 Harrison Street SE, 4th Floor  
Leesburg, Virginia 20175

### INTEGRATED GRANTS MANAGEMENT SYSTEM

#### 6.0 SIGNATURE PAGE

THE FIRM OF: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Person to contact regarding this Request for Information: \_\_\_\_\_

Title: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

By signing above the firm acknowledges receipt of the following notification: The information provided in the RFI is subject to change and is not binding on the County. The County has not made a commitment to procure any of the items discussed, and release of this RFI should not be construed as such a commitment or as authorization to incur cost for which reimbursement would be required or sought. All submissions become County property and will not be returned.