Steve Kosko, Chief Revenue Officer
StreamLink Software
812 Huron Road East, Suite 550
Cleveland, OH 44115

July 27, 2017

Ms. Gail Burchett
Purchasing Officer II
State of Nevada, Purchasing Division
515 E. Musser Street, Suite 300
Carson City, NV 89701

Dear Ms. Burchett,

Since 2011, StreamLink Software has been providing AmpliFund, Commercial-Off-The-Shelf (COTS), end to end, SaaS grants management software, for an array of clients throughout the country. AmpliFund is a best-in-class solution for effectively managing the entire grants lifecycle.

While AmpliFund has many clients across many different industries, it should be noted that one of our current clients is HHS within the State of Nevada. The AmpliFund team has been working with the Agency for 1 year, and while the scope of this RFP is larger, the functionality that is being utilized and the method by which it was deployed is very similar to our proposed plan for this RFP. We feel that we have built a strong relationship with the team, and we are very pleased that they agreed to be a reference for this RFP response. Their willingness to serve as a reference is a great indication that they believe AmpliFund is providing value, and we hope that the State sees this as a true indication that AmpliFund is the right solution for the State as whole.

Details specifically addressing AmpliFund's ability to meet and exceed the functionality outlined in the State's RFP can be found within this response. If you have any questions regarding the enclosed documents, please contact Olivia Hartman, Enterprise Business Development Manager, at ohartman@streamlinksoftware.com or (216) 377-5500 extension 1583.

Sincerely,

Steve Kosko, Chief Revenue Officer

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AmpliFund™
Public Sector

Section I - Title Page

Part IA – Technical Proposal	
RFP Title:	Grant Management System
RFP:	3474
Vendor Name:	StreamLink Software Inc.
Address:	812 Huron Rd. E, Suite 550 Cleveland, OH 44115
Opening Date:	July 31, 2017
Opening Time:	2:00 PM

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VENDOR INFORMATION SHEET FOR RFP 3474

Vendor Shall:

A) Provide all requested information in the space provided next to each numbered question. The information provided in Sections V1 through V6 shall be used for development of the contract;

B) Type or print responses; and

C) Include this Vendor Information Sheet in Section III of the Technical Proposal.

V1	Company Name	StreamLink Software, Inc.

V2	Street Address	812 Huron Rd. East, Suite 550

V3	City, State, ZIP	Cleveland, OH 44115

V4	Telephone Number		
	Area Code: 216	Number: 377-5500	Extension:

V5	Facsimile Number		
	Area Code: 216	Number: 377-5501	Extension:

V6	Toll Free Number		
	Area Code:	Number:	Extension:

V7	***Contact Person for Questions / Contract Negotiations, including address if different than above***
	Name: Kevin Burgess
	Title: Director of Enterprise Sales
	Address:
	Email Address: kburgess@streamlinksoftware.com

V8	Telephone Number for Contact Person		
	Area Code: 202	Number: 601-8926	Extension:

V9	Facsimile Number for Contact Person		
	Area Code:	Number:	Extension:

V10	***Name of Individual Authorized to Bind the Organization***	
	Name: John Dearborn	Title: President

V11	Signature ***(Individual shall be legally authorized to bind the vendor per NRS 333.337)***	
	Signature:	Date: 7/26/17

Section IV – State Documents

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State of Nevada
Department Administration
Purchasing Division
515 E. Musser Street, Suite 300
Carson City, NV 89701

Brian Sandoval
Governor

Jeffrey Haag
Administrator

SUBJECT:	Amendment 1 to Request for Proposal 3474
RFP TITLE:	Grant Management System
DATE OF AMENDMENT:	July 25, 2017
DATE OF RFP RELEASE:	July 17, 2017
OPENING DATE:	July 31, 2017
OPENING TIME:	2:00 PM
CONTACT:	Gail Burchett, Procurement Staff Member

The following shall be a part of RFP ***3474.*** If a vendor has already returned a proposal and any of the information provided below changes that proposal, please submit the changes along with this amendment. You need not re-submit an entire proposal prior to the opening date and time.

---

1. Can you please provide the State's number of unique sub-recipient organizations that would require access to the system?

   The State estimates the number of unique sub-recipient organizations to be approximately 150.

2. In addition to the 5 Office of Grant Procurement users, how many state agency users will require access to the system? How many users are anticipated within each agency? How many recipient users will be using the system?

   This will be a state-wide, cross-agency implementation. 500+ users are expected to access the system (both internal and external).

3. Can you please provide the State's average annual grant revenue that would be managed in the system?

   The State estimates an annual Federal grant revenue of approximately $2.5 billion.

4. Have you had any assistance in preparing this RFP? If so, from whom?

   No.

5. Does the State have a preference regarding a SaaS vs a non-SaaS solution?

The State prefers the SaaS, or Cloud-based solution.

6. Does the Office of Grant Procurement have the authority to mandate all agencies within the State to purchase/utilize the selected grant management system? If no, how many state agencies are estimated to utilize the system?

The budget enhancement from Governor and Legislators is for a state-wide grant management system. It is expected that all agencies will use the selected grant management system.

7. Can you please provide the desired project timeline? Will all agencies be implemented at once (beginning Oct 10), or over a staggered time period? Will the implementation of functionality be staggered as well (i.e. research, pre-award, post-award, granting out, sub-recipient monitoring)? If yes, please provide detail regarding the desired order of functionality implementation.

The State would like a full implementation before November 2018, with tiered implementation of functionality.

8. Please detail the aspects of this project that are covered within the $200,000 annual project budget. For example, does this budget include software license, integration work, training/project management/change management, configuration, data migration, etc.?

The budget enhancement for the solution is $200,000 annually, the State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system. This is inclusive of license, implementation etc.

9. Does the State intend to have agencies supplement the funding of the application, currently or in the future?

No.

10. Will the existing grants management systems used by individual agencies be replaced by this statewide system?

Yes, as individual contracts expire.

11. Within Section 4 it is outlined that narrative descriptions of how tasks within 4.4-4.9 will be accomplished. Does the State want descriptions for 4.2-4.3?

Yes. This is considered as part of the Scope of Work, section 4.

12. Section 4.5 Change Management, 4.5.3.4: "State shall determine if increased funding is needed." Per this language, if increased funding is needed to implement change management in

the various agencies that goes beyond the annual $200K budget, will the additional funding be allowed?

No. The budget enhancement for the solution is $200,000, the State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system.

13. Given that responses to bidder questions will be posted July 25th, would the State consider extending the submission deadline to two weeks from posting of responses?

    No.

14. What is the Department's estimated cost of this project?

    Estimated cost for the solution is $200,000 annually. The State estimates internal costs of approximately $12,000 additionally for the project.

15. How will this project be funded?

    This project has been funded through a General Fund allocation.

16. Whether companies from Outside USA can apply for this? (like, from India or Canada)

    The State's data cannot leave the United States.

17. Whether we need to come over there for meetings?

    The State expects that vendors will have various solutions for planning, implementation and testing and will work with the selected vendor to determine best practices.

18. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

    The State's data cannot leave the United States.

19. Can we submit the proposals via email?

    No.

20. In section 2.1, it states that funds were appropriated during Nevada's 79th legislative session. Was there a specific amount appropriated (i.e. is there a budget for this project)? On pg. 8, it states "For an amount not to exceed $200,000 annually the full lifecycle grant management system will...:" Is this the budget for this project? If so, does this amount include

initial implementation, licensing, etc as well as each subsequent year (i.e. each year of the contract, including year 1), can not exceed $200,000?

The budget enhancement for the solution is $200,000 annually. The State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system. This amount is inclusive of implementation, licensing etc..

21. How many state agencies could potentially be using this system? Just the Nevada Grant Office, or will there be more?

    This will be a state-wide, cross-agency implementation. The State has various agencies located within approximately 25 Departments. Not all Departments have grants, and many have fewer than others.

22. In section 2.2, it states that there are 5 employees in the Nevada Grant Office. Will this be the total number of internal users of the system? If not, how many internal users do you anticipate? External users? Will those 5 employees be considered administrators? Or just 1 or 2 of them? Of the internal users, how many will be high volume users (using the system 40+ hours/month)? Low volume users (less than 40 hours/month)?

    No. This will be a state-wide, cross-agency implementation. 500+ users are expected to access the system (both internal and external). At this time the state does not have the capability to assess high and low volume users.

23. In section 2.5, it states that a handful of state agencies have a stand-alone grant management system (instead of ad-hoc spreadsheets like most agencies). Do these handful of agencies also plan to implement the new grant management system?

    Yes, as their contracts expire.

24. Section 4.7.2.3, it states that vendor shall migrate all data. How much data does this include? In what format is the data - Excel and .CSV files? Paper? Combination of both?

    Excel and .CSV files (or best practice as determined) are expected to be used for data migration. The State expects to migrate all open Federal and State grant awards, all closed awards will not be migrated. At this time the State does not have the capability to assess the amount of data.

25. Section 4.8.2.1, it states that the vendor shall streamline a variety of forms for efficiency and consolidation. Approximately how many forms? What kind of forms?

    All grant management forms for the life-cycle of a grant. Announcement, Request for Proposals, Evaluation, Sub-grant Awards, Assurances, Progress Reporting, Expenditure Reporting, Source Documentation, Performance Outcomes, Amendments, Extensions, and Close-out Documents, Etc..

26. Section 5.1.4 and 5.1.5, it states that the selected vendor, prior to doing business in the State of Nevada, shall be appropriately licensed. Then it states that vendors shall be proactive in verification of these requirements prior to submitting a proposal. If we are not registered with the State of Nevada (but in the process) at the time of proposal submittal, will we be deemed non-responsive? Especially since it states that we just need to be licensed prior to doing business?

No. Licensing will be expected before contract execution.

27. Section 12.2.1, Background Checks - who is responsible for paying for background checks? The State of Nevada? The Vendor?

The State strikes section 12.2.1 Background Checks.

28. Section 12.3.4.1 - the contractor shall be required to have its project management located in Carson City for the duration of the project. For substantial cost savings, we typically perform most of the work remotely. We do go onsite at the beginning of the project (project kickoff, discovery sessions), potentially a few times during the implementation and at the end for training. Is this acceptable? Or is it an absolute requirement to be onsite full time for the duration of the project? This question also applies to section 12.3.10 (travel requirements).

This is acceptable. The contractor is not required to have a project manager located in Carson City. The State strikes section 12.3.4.1; and 12.3.4.6.

29. 10) Section 12.3.17 - Is there a preferred go-live date?

The State would like a full implementation before November 2018, with tiered implementation of functionality.

30. Were there demonstrations by vendors of existing Grant Management systems COTS packages and if so, will the State share the list of them?

No, the State conducted a Request for Information – however no demonstrations have occurred.

31. Proposal Due Date: Will the State of Nevada (State) consider revising the proposal due date to three weeks following the posting of answers to the vendor questions?

No.

32. Previous RFI: On June 1, 2016, RFI responses were provided to similar State requirements, can the State provide the vendor names of the RFI respondents?

No. This RFP replaces all previous efforts to procure a grant management system.

33. Sole Source: We had received a written notification the State had decided to Sole Source a Statewide Enterprise Grants Management System (EGMS). Please confirm this current RFP replaces that Sole Source effort? If this a replacement can the State provide the intended Sole Source vendor name and will they be allowed to compete for this competitive sourced opportunity? If this is not a replacement for that Sole Source, can the State provide us information about the deliverables/functionality of the Sole Source and the vendor receiving that award?

This current RFP replaces all previous efforts. All contractors and vendors will be permitted to submit proposal for evaluation.

34. Demonstrations: Has the State received any system demonstrations and/or presentations from vendors from the RFI submissions or since? If so, which vendor/systems were seen and when?

No.

35. Budget: Stated in the RFP is that during Nevada's 79th legislative session funds were appropriated to purchase and implement such a system. Is this appropriated dollar amount the same as the Governor recommended amount in the 2017-2018 budget of $212,718 or is it a different amount that was approved? If different can you please disclose the budget for this project and what items in the RFP the budget amount should cover and for what period of time?

The budget enhancement for the grant management system is $200,000. Additional funds ($12,718) were provided for internal costs to ancillary activities and State agencies.

36. Grant Systems: Can the State provide the vendor/system names of the existing grants management systems in use at the handful of state agencies that have a stand-alone grant management system?

The State will not provide existing grant management system names at this time. The State does not expect the selected vendor to integrate with the stand-alone grant management systems.

37. RFP Document: Did the State utilize any vendor / SME consultants in defining the functionality and/or scope of work enumerated in the RFP?

The State did not procure external SME consultants.

38. Grant System: Given the changing grants regulatory environment, does the State prefer vendors who have experience deploying Grants Management Systems at the Federal level?

No. The State prefers implementation experience and does not make a Federal distinction.

39. Grants: Can the State provide the average total annual dollar amount of grant funding that will be handled by the new EGMS? What percent of this funding are pass-through to sub-grantees?

The State estimates an annual Federal grant revenue of approximately $2.5 billion with approximately 50% being sub-granted.

40. Grant Programs: Can the State provide the total number of grant programs that we be supported by the new EGMS?

At this time the State is not able to provide the total number of grant programs to be supported by the new EGMS.

41. EGMS Requirements: The State only requires Grantor and sub-recipient capabilities of the new EGMS, does the State already have the "find and apply" for Federal grants (Grantee), if so what vendor is providing that capability, if not, will this be an enhancement to EGMS in the future?

The State does not currently have the "find and apply" for Federal grants, the State would like to include this in the selected system. Please see Requirement Matrix 3.2, Task 1.

42. Agency Use: The RFP states that currently, Nevada does not have a state-wide, cross-agency grant management system. Can you provide the number of agencies that will be using the new EGMS? Will agency's use be voluntary or mandatory?

All State agencies will be expected to use this system. The State has various agencies located within approximately 25 Departments. Not all Departments have grants, and many have fewer than others.

43. Agency Roll out: Will this be "big bang" where all agencies will go onto the system at one time or does the State desire a planned roll out and grouping of agencies for on-boarding?

The State would like a full implementation before November 2018, with tiered implementation of functionality. The detailed timeline will be coordinated with the selected vendor.

44. EGMS Users: How many "internal" State users will require system access on day one, and on day 365? How many external or sub-recipient users will require system access on day one, and on day 365?

Not all users will use the system for the same function. The users on day 1 versus the users on day 365 will depend on the functionality that is available on those 2 days. The State expects as the system implements more users will be accessing the system by day 365 (top end of total users) than on day 1.

45. Requirements Matrix: Prior to the requirements matrix in RFP Section 3.2 is this statement: "For an amount not to exceed $200,000 annually the full-life cycle grant management system will include:" Please provide details of what the State expects for the NTE $200K annually? Is this for each configuration/deployment of the 9 main task areas ($200k x 9 = $1.8M), plus licensing cost or something else?

The budget enhancement for the solution is $200,000 annually. The State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system.

46. Data Conversion: Can the State provide an estimate of the volume of data to be converted and migrated into the new Grants Management System? What is the current format of this grant data?

Much of the detail resides in Exel spreadsheets. At this time the State is unable to estimate the data of volume to be converted.

47. Data Import: Will the import/export of data into the EGMS be achieved via a data loading type capability for xls/csv files or through API/web services? If the later, can the State provide details on the type and underlying technology of any external agency grants/accounting systems in use today?

Excel and .CSV files (or best practice as determined) are expected to be used for data migration. The State expects to migrate all open Federal and State grant awards, all closed awards will not be migrated. The State expects initial import of data to be via xls/csv files, or through a more efficient manner should the selected vendor propose one.

48. Financial Management - ERP: It's stated that Advantage is the State's financial management system, can you please confirm this is CGI Advantage and what release/version are you currently running? Does the State perform all interface configuration and support functions on Advantage or is it done by another vendor, if so can you provide the vendors name? Also, can you provide the expectation for the type of integration required, e.g., web services, file based, one way or bi-directional data flow?

The State prefers a data push to the selected grant system. The State performs interface configuration and support functions for Advantage 2000.

49. Contract Management: The State wants to interface data with Nevada's contract management system? What does the State use for the contract management system, name, model, version and what are the interface capacities of this system? Does the State perform all interface configuration and support functions on this contract management system or is it done by another vendor, if so can you provide the vendors name? Also, can you provide the expectation for the type of integration required, e.g., web services, file based, one way or bi-directional data flow?

The State would prefer the system to integrate with selected Contract Management system (not yet selected). Contract and Grants are distinctly different, when staff is working with a

Contract the State expects those activities occur in the Contract Management system and vice-versa.

50. Security: Does the State require the SaaS based solutions to be provisioned on a FedRAMP certified cloud platform?

    No.

51. Software Upgrades: Does the State require its EGMS to be updated annually free of charge to keep pace with changing federal legislation?

    The budget enhancement for the solution is $200,000 annually. The State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system. Upgrades to the system (cost and no-cost) will be considered in the proposal evaluation process.

52. Forms: Can the State provide the number of forms and examples that will be required for EGMS to support electronically?

    All grant management forms for the life-cycle of a grant. Announcement, Request for Proposals, Evaluation, Sub-grant Awards, Assurances, Progress Reporting, Expenditure Reporting, Source Documentation, Performance Outcomes, Amendments, Extensions, and Close-out Documents, Etc..

53. Workflows and Approvals: Will the State have standardized workflows and approvals for each grant life-cycle phase or will there be multiple variations, or will each agency be different? Please clarify the State's intention.

    The State expects to have standardized workflows, with little variation.

54. Application Reviews: Does the State have a single step review process, if not can you elaborate on your application review process?

    Typically, the grant application review process begins with 1) Technical Review – agency lead reviews for requirements; 2) Committee Review – reviewed for scoring and ranking; and ends with 3) Agency Risk Review – reviewed for risk and weighted measures.

55. Costs: Should the cost assumptions be placed at the end of each cost table tab?

    Yes, if applicable.

56. Reference Questionnaires: Will the State modify the return date to coincide with the final proposal due date?

    The proposal due date is July 31, 2017 at 2pm PST. The State will not modify this date.

57. Proposal Submission Format: In Section 10.2.2, it notes; Section 10.2.2.9 Section IX – Preliminary Project Plan and Section 10.2.2.10 Section XI – Other Informational Material. There is no Section X, is that missing or there in fact is no Section X?

Section X is the inclusion of the completed Requirement Matrix from section 3.2.

58. Proposal Submission Checklist: In RFP Section 13. Submission Checklist, the table lists; Section IX Requirements Matrix and Section X Other Information Material. Please clarify requested section contents for each of Sections IX, X and XI.

Section IX: Preliminary Project Plan
Section X: Requirement Matrix
Section XI: Other Information Material

59. Certifications: Attachment B is the Vendor certifications, are other certifications required, if so can you please elaborate?

No other Vendor Certifications are included in this RFP.

60. Proposal Due Date
Can the State of Nevada (the State) revise the proposal due date to three weeks following the posting of answers to the vendor questions?

No.

61. Budget for Project
The RFP makes reference that during Nevada's 79th legislative session funds were appropriated to purchase and implement such a system. Can the State provide the dollar amount appropriated, to include one-time implementation costs as well as ongoing licensing costs? Do these funds cover the entire contracting term?

The budget enhancement for the solution is $200,000 annually. The State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system. This is inclusive of implementation and licensing costs.

62. Current Grant Management Systems
Can the state provide a summary of the current grant management systems in use by state agencies?

The State will not provide existing grant management system names at this time. The State does not expect the selected vendor to integrate with the stand-alone grant management systems.

63. Grant Volume and Funding Value

Can the State provide a five-year historical summary of the volume (number) and value (dollars) of grants that will be managed by the new system?

The State's approximate five-year average of awards (includes ARRA funding) is $3.62 billion. Volume is not currently available as USASpending.gov reports amendments as new awards.

64. Number of Agencies

Can the State provide the number of State Agencies that will use the new grant management system?

All State agencies will be expected to use this system. The State has various agencies located within approximately 25 Departments. Not all Departments have grants, and many have fewer than others.

65. Stakeholders Utilizing Grant Management System

Can the State provide the number of stakeholders / state employees that will be utilizing (will require training on) the grant management system? Please identify the locations and number of users per location.

The State expects 500+ internal and external users of the grant system for varying functions. The vast majority are located in Reno/Sparks/Carson City; fewer users in Las Vegas and even less sporadic throughout the remaining 14 Nevada counties. The State expects to conduct training to systems users outside of the Reno/Sparks/Carson City area using a 'train-the-trainer' model.

66. Mapping of Processes

The RFP makes reference to mapping of processes. Can the State estimate the number of currents processes that should be mapped?

All grant management processes for the life-cycle of a grant. Announcement, Request for Proposals, Evaluation, Sub-grant Awards, Assurances, Progress Reporting, Expenditure Reporting, Source Documentation, Performance Outcomes, Amendments, Extensions, and Close-out Documents, Etc..

67. Response Page Limits

Are there specific page limits for the four response sections?
10.1.2.1 - Technical Proposal
10.1.2.2 - Confidential Technical (if applicable)
10.1.2.3 - Cost Proposal
10.1.2.4 - Confidential Financial

No.

68. Number of Historical Grants
Can you estimate the number historical grants that would need to be converted from the old system to the new application and the number of legacy systems/tools that would provide that data?

Much of the detailed grant data is held within excel spreadsheets through-out agencies. The 'totaled' amounts are captured in the State's Advantage system. Open grant awards are expected to be migrated to the new system, all closed grants will remain outside of the system. At this time the State cannot estimate the total number of grants.

69. Integration with Other Systems
Can you provide the number of systems that the new system would need to integrate with?

The selected solution must integrate with the State's ERP system Advantage.

70. Security Standards, 3.1.1, "System shall meet State security standards for transmission of personal information as outlined in NRS 205.4742 and NRS 603A"

Are Proponent's bound to all terms and conditions outlined in NRS 205.4742 and NRS 603A or only terms around transmission of personal information. There are many terms and conditions in these links that do not apply to cloud-based solutions. Additionally, Office of Grant Procurement has outlined transmission requirements in Attachment K 'Requirements Matrix'.

Therefore would Office of Grant Procurement please remove requirement 3.1.1?

No. The State cannot exempt vendor from Nevada Revised Statutes.

71. Security Standards, 3.1.9
We are not able to access NRS and NAC 239, Records Management. Cloud Service Provider (CSP) maintains our own company Media Handling Policy which include destruction of processing equipment. For instance, Corporate and Production backup tapes which are bad, failing or expired are retained in secure storage within the dedicated CSP data center space for future onsite destruction. CSP receives a certificate of destruction from the mobile destruction vendor.

Therefore would Office of Grant Procurement please allow CSPs to respond with their own Media Handling Policy to meet this requirement?

The vendor can use their own policies, provided they are not less strict than NAC 239 Records Management – this section has been provided. NAC: CHAPTER 239 - PUBLIC RECORDS

72. 3.1.10 - Software development projects must comply with State Information Security Consolidated Policy 100, Section 4.7, Software Development and Maintenance and State Standard 131, "Security for System Development".
We assume a SaaS COTS solution does not meet Office of Procurement's definition of a software development project. For instance, requirement 3.1.10.1 states the production environment must be established on State systems.

Would Office of Grant Procurement please remove requirement 3.1.10 and the requirements under 3.1.10.1 or would Office of Grant Procurement consider those requirements not applicable to cloud solutions?

The State would consider those requirements not applicable to cloud solutions.

73. 12.3.11 - Source Code Ownership, 12.3.14 - Guaranteed Access to Software
For PaaS/SaaS solutions, a Cloud Services Provider (CSP) would be responsible for maintaining access in terms of performance and availability to Office of Grant Procurement's data. Office of Grant Procurement's data would be owned by Office of Grant Procurement. Office of Grant Procurement would have access to its data and metadata, but not all of the PaaS/SaaS solution source code. Office of Grant Procurement would have full rights to extract their data at any time during the subscription service. However, PaaS/SaaS CSP does not typically offer system source code because it is inapplicable to software delivered as a service subscription through a multitenant architecture. While it is possible to provide the source code in an escrow account for a configured solution, the source code would only be able to operate in the CSP's PaaS/SaaS environment.

Therefore, can Office of Grant Procurement remove the source code requirements or consider it not applicable to cloud solutions?

Source code requirements would not be applicable to cloud solutions.

74. Attachment C - Contract Form, 9. INSPECTION & AUDIT
As a multi-tenant cloud service provider, we do not typically offer a Right to Audit clause as part of the base service offering. As a multi-tenant service, compartmentalization is virtual, not physical. Annual site visits can be arranged at Office of Grant Procurement's expense, but in consideration of our other customers, random access cannot be permitted. We have third party auditors that inspect and review our security. We undergo annual audits for compliance with additional frameworks such as SSAE 16 SOC 1, SOC 2, SOC 3, ISO 27001, and PCI-DSS Level 1. The results of these audits can be provided to Office of Grant Procurement as desired under NDA. Is this acceptable to meeting Office of Grant Procurement's requirements?

This is considered acceptable to meeting the requirements.

75. If a requirement in Office of Grant Procurement's requested response format is not applicable to a SaaS model, how do we respond that it is not applicable without our evaluation being negatively impacted?

A SaaS or Cloud-based system is preferred but not required.

76. What are the total individual named users (internal and external) that will require access to the Grants Management solution? Can Office of Procurement please specify total named users for each user role/type?

At this time the State does not have total individual named users.

77. What is the Office of Grant Procurement's budget for one-time implementation cost? What is the Office of Grant Procurement's budget for recurring software license and support cost?

The budget enhancement for the solution is $200,000 annually. The State will select the vendor that provides the most functionality across all agencies for a full-life cycle grant management system. This is inclusive of implementation, licensing and support costs.

78. Will Office of Procurement please extend the RFP response deadline by two weeks to August 14, 2016?

No.

79. Will Office of Procurement please extend the Customer Reference Questionnaire deadline by two weeks to August 11, 2016?

No.

80. We assume this only applies to contractor personnel that are performing the solution implementation services and not the Cloud Service Provider (CSP) personnel that are hosting the solution.

For example, CSP engages the services of a background screening vendor to conduct background checks on employees at the time of hire in the U.S.

CSP also performs background investigations in certain foreign countries. The scope of these checks is subject to local laws in the jurisdictions in which the employee is hired. Can Office of Procurement please modify this requirement accordingly?

The Background Check section 12.2.1 has been struck.

81. Sole Source Intention: There was written notification that the State had decided to Sole Source a Statewide Enterprise Grants Management System (EGMS). Which vendor did the State intend to sole source this project to? Given the criticality of a fair and open competition to the State, will this vendor be allowed to compete on the current RFP?

This current RFP replaces all previous efforts. All contractors and vendors will be permitted to submit proposal for evaluation.

82. Security: Given the security concerns and data needs of the State for such a highly visible system, does the State require the solution to be provisioned on a FedRAMP certified cloud platform? FedRAMP is the prevailing platform security standard for government systems.

No.

83. Forms: Can the State provide the type and number of forms that will be required to be made electronic within EGMS? How common / different are these forms by grant program / Agency? Please provide 2-3 examples of these forms as they exist today.

All grant management forms for the life-cycle of a grant. Announcement, Request for Proposals, Evaluation, Sub-grant Awards, Assurances, Progress Reporting, Expenditure Reporting, Source Documentation, Performance Outcomes, Amendments, Extensions, and Close-out Documents, Etc.. At this time the State does not have examples to provide bidders.

84. Workflows and Approvals: Will the State have standardized workflows and approvals for each grant lifecycle phase or will there be multiple variations? Will each Agency largely retain its existing workflows and approvals or will they adopt a State-standard? Please clarify the State's intention for standardizing workflows, approvals, and business rules across grant programs and agencies.

The State expects to have standardized workflows, with little variation.

85. System Turnover date: The anticipated start date is October 10, 2017, when does the State anticipate going live with the EGMS?

The State would like a full implementation before November 2018, with tiered implementation of functionality. The detailed timeline will be coordinated with the selected vendor.

ALL ELSE REMAINS THE SAME FOR RFP 3474.

Vendor must sign and return this amendment with proposal submitted.

Vendor Name: StreamLink Software, Inc.

Authorized Signature: _____

Title: President Date: 7/26/17

This document must be submitted in the "State Documents" section of vendors' technical proposal.

ATTACHMENT A – CONFIDENTIALITY AND CERTIFICATION OF INDEMNIFICATION

Submitted proposals, which are marked "confidential" in their entirety, or those in which a significant portion of the submitted proposal is marked "confidential" **shall not** be accepted by the State of Nevada. Pursuant to NRS 333.333, only specific parts of the proposal may be labeled a "trade secret" as defined in NRS 600A.030(5). All proposals are confidential until the contract is awarded; at which time, both successful and unsuccessful vendors' technical and cost proposals become public information.

In accordance with the submittal instructions of this RFP, vendors are requested to submit confidential information in separate files marked "**Part IB Confidential Technical**" and "**Part III Confidential Financial**".

The State shall not be responsible for any information contained within the proposal. If vendors do not comply with the labeling and packing requirements, proposals shall be released as submitted. In the event a governing board acts as the final authority, there may be public discussion regarding the submitted proposals that shall be in an open meeting format, the proposals shall remain confidential.

By signing below, I understand it is my responsibility as the vendor to act in protection of the labeled information and agree to defend and indemnify the State of Nevada for honoring such designation. I duly realize failure to so act shall constitute a complete waiver and all submitted information shall become public information; additionally, failure to label any information that is released by the State shall constitute a complete waiver of any and all claims for damages caused by the release of the information.

This proposal contains Confidential Information, Trade Secrets and/or Proprietary information.

Please initial the appropriate response in the boxes below and provide the justification for confidential status.

Part IB – Confidential Technical Information			
YES	JD	NO	
Justification for Confidential Status			
This proposal contains confidential information and trade secrets.			

Part III – Confidential Financial Information			
YES	JD	NO	
Justification for Confidential Status			
This proposal contains confidential information and trade secrets.			

StreamLink Software, Inc.

Company Name

Signature

John Dearborn

Print Name

7/26/17

Date

This document shall be submitted in Section IV of vendor's technical proposal

ATTACHMENT B – VENDOR CERTIFICATIONS

Vendor agrees and shall comply with the following:

(1) Any and all prices that may be charged under the terms of the contract do not and shall not violate any existing federal, State or municipal laws or regulations concerning discrimination and/or price fixing. The vendor agrees to indemnify, exonerate and hold the State harmless from liability for any such violation now and throughout the term of the contract.

(2) All proposed capabilities can be demonstrated by the vendor.

(3) The price(s) and amount of this proposal have been arrived at independently and without consultation, communication, agreement or disclosure with or to any other contractor, vendor or potential vendor.

(4) All proposal terms, including prices, shall remain in effect for a minimum of 180 days after the proposal due date. In the case of the awarded vendor, all proposal terms, including prices, shall remain in effect throughout the contract negotiation process.

(5) No attempt has been made at any time to induce any firm or person to refrain from proposing or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal. All proposals shall be made in good faith and without collusion.

(6) All conditions and provisions of this RFP are deemed to be accepted by the vendor and incorporated by reference in the proposal, except such conditions and provisions that the vendor expressly excludes in the proposal. Any exclusion shall be in writing and included in the proposal at the time of submission.

(7) Each vendor shall disclose any existing or potential conflict of interest relative to the performance of the contractual services resulting from this RFP. Any such relationship that might be perceived or represented as a conflict shall be disclosed. By submitting a proposal in response to this RFP, vendors affirm that they have not given, nor intend to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement. Any attempt to intentionally or unintentionally conceal or obfuscate a conflict of interest shall automatically result in the disqualification of a vendor's proposal. An award shall not be made where a conflict of interest exists. The State shall determine whether a conflict of interest exists and whether it may reflect negatively on the State's selection of a vendor. The State reserves the right to disqualify any vendor on the grounds of actual or apparent conflict of interest.

(8) All employees assigned to the project are authorized to work in this country.

(9) The company has a written equal opportunity policy that does not discriminate in employment practices with regard to race, color, national origin, physical condition, creed, religion, age, sex, marital status, sexual orientation, developmental disability or handicap.

(10) The company has a written policy regarding compliance for maintaining a drug-free workplace.

(11) Vendor understands and acknowledges that the representations within their proposal are material and important, and shall be relied on by the State in evaluation of the proposal. Any vendor misrepresentations shall be treated as fraudulent concealment from the State of the true facts relating to the proposal.

(12) Vendor shall certify that any and all subcontractors comply with Sections 7, 8, 9, and 10, above.

(13) The proposal shall be signed by the individual(s) legally authorized to bind the vendor per NRS 333.337.

StreamLink Software, Inc.

Vendor Company Name

Vendor Signature

John Dearborn

Print Name

7/26/17

Date

This document shall be submitted in Section IV of vendor's technical proposal

CUSTOMER AGREEMENT

THIS CUSTOMER AGREEMENT is entered into by and between StreamLink Software Inc., a Delaware corporation, and the party identified below as the "Customer". Capitalized terms used in this Customer Agreement have the meanings set forth in the Standard Terms & Conditions attached hereto as **Exhibit A**.

BACKGROUND: StreamLink desires to provide the Software Product to the Customer and the Customer desires to obtain the Software Product from StreamLink, all upon the terms and conditions more fully set forth in this Agreement. In consideration of these premises, and the representations, warranties and covenants set forth in this Agreement, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, StreamLink and the Customer agree as follows:

1. Software Subscription. StreamLink hereby grants the Software License to the Customer as of the Signature Date. After the Signature Date, StreamLink shall provide the Support Services.

2. Business Terms. The rights and obligations of the Customer and StreamLink will (a) be subject to the Standard Terms, (b) begin as of the Signature Date, (c) remain in full force and effect for an "Initial Term" of 1 year (initial ____) or 3 year (initial ____) and for each Renewal Term (if applicable) and (d) continue until terminated in accordance with the Standard Terms. During the Term, the following Business Terms shall apply:

- Set up, which includes:
  - Initial configuration of license
  - Personalized virtual training and implementation
- On-going subscription and add-ons, which include:
  - Continuous hosting, with hourly data back-ups
  - Unlimited storage, users—including board members, committee members, and staff, metrics, baselines and documents
  - 24/7 access to the system
  - All upgrades to the existing product and new versions released or implemented after the date associated with the signature below.
  - New Modules will be offered as they are released at a 10% discount.
- Service/Support include:
  - Full technical support, customer service and advanced data security Customer support is available from 8:00am – 8:00pm EDT, Monday through Friday. Customers can submit support tickets, feature requests and bug reports online 24/7. We offer a toll-free support line and an online support chat feature during business hours. Access to the help desk is included in the pricing structure. Support costs are not separate.
  - A tiered support structure. Online requests are seen in real time by the Tier 1 Support Team, and phone calls are answered or returned within the same business day (typically within the hour). If the issue can't be handled immediately, a defect report is filed. If a work-around is not available, defect resolution is escalated to the highest level.
  - On-going virtual training, plus a wide range of online training and support resources (user manuals, in-product tips and information, videos, webinars and more). On-site training is available for an additional cost. Training to all current and future users will be provided at no additional charge.

	Description	Unit Cost	Units	Total Cost
Annual License Fee			1 year	$
1-Time Set-Up Fee	n/a	n/a	n/a	n/a
Additional Features		n/a	n/a	n/a
Additional Features	Additional APIs	n/a	n/a	n/a
Additional Support	Extra Support Hours	n/a	n/a	n/a
Additional Support	On-Site Training	n/a	n/a	n/a
Discount	2 Year Deal, See Exhibit A		n/a	$

IN WITNESS WHEREOF, each of the Parties has executed this Agreement, or has caused this Agreement to be executed by its duly authorized representative, as of the Signature Date.

"STREAMLINK"

StreamLink Software Inc.

Sign: _____

Name: _____

Title: _____

Address: **812 Huron Road, Suite 350**

Cleveland, OH 44115

email: _____

Attention: License Agreements

Signature Date: _____

"CUSTOMER"

Name of Customer

Sign: _____

Name: _____

Title: _____

Address: _____

_____

email: _____

Attention: _____

Customer Administrator: _____

Exhibit A

Standard Terms & Conditions

1. StreamLink Services; Fees.

1.1 StreamLink shall provide the Add-On Services (if any) and, after the Signature Date, the Support Services.

1.2 The Customer shall pay to StreamLink the Set Up Fee and the Subscription Fee within thirty days of the Signature Date.

1.3 StreamLink shall deliver to the Customer an invoice for any Amounts Due by the Customer. If there are any Amounts Due by the Customer, (a) the Customer shall pay the undisputed portion of such Amounts Due during the Invoice Period, (b) the Customer shall be responsible for paying, and/or shall reimburse StreamLink for, any sales, use, excise, value-added, withholding or other taxes due or payable as a result of such Amounts Due and (c) the Customer shall reimburse StreamLink for any fees, costs, expenses (including reasonable attorneys' fees and costs) or other amounts incurred in collecting such Amounts Due. Interest at a rate of 1% per month shall accrue on any Amounts Due by the Customer that are not disputed during, and remain unpaid at the end of, the Invoice Period corresponding thereto.

1.4 The Customer may request additional products and/or services by notifying StreamLink of such request and/or delivering to StreamLink an Addendum. Upon StreamLink's acceptance of such request, and/or countersignature and return to the Customer of such Addendum, these Standard Terms shall apply to StreamLink's delivery and/or provision of such additional products and/or services.

2. License Terms.

2.1 StreamLink hereby grants the Software License to the Customer as of the Signature Date.

2.2 The Customer may not (a) authorize or license any third-party other than its, and its Affiliates', officers, employees and independent contractors to use the Software Product or any part thereof (whether directly or indirectly), or (b) distribute, license, sublicense, promote, distribute, market, sell, lease, assign, convey, transfer or transmit the Software Product or any part thereof.

2.3 All right, title and interest in and to each of the following is, shall be and at all times shall remain the exclusive property of StreamLink and any third-parties whose software programs may have been, or may be, incorporated into the Software Product: (a) the Software Product, (b) any software, software modifications, derivative works, processes, and other intellectual property rights relating to data processing and information technology developed or held by either Party from its use of the Software Product and (c) all copyright, trademark, patent, trade secret and intellectual property rights in the Software Product. StreamLink, on behalf of itself and any third-parties with software that may have been, or may be, incorporated into the Software Product, reserves all of its, and all of such third-parties', rights in the same.

3. Representations & Warranties.

3.1 The Customer hereby represents and warrants to StreamLink that, as of the Signature Date, it has the full right, power and authority to enter into, and fully perform its obligations according to, the Agreement.

3.2 StreamLink hereby represents and warrants to the Customer that, as of the Signature Date, (a) it has the full right, power and authority to enter into, and fully perform its obligations according to, the Agreement, (b) it has the full right, power and authority to grant to the Customer the rights and licenses described herein and (c) it has not knowingly infringed upon the intellectual property rights of any third-party or knowingly misappropriated the trade secrets of any third-party in granting the Software License to the Customer.

4. Indemnification.

4.1 StreamLink shall indemnify, defend and hold harmless the Customer and the Customer Users from and against any liabilities, costs, fees and/or damages that arise out of any Indemnifiable Claim.

4.2 The Customer shall notify StreamLink of each Indemnifiable Claim as soon as the Customer is aware of its occurrence and deliver to StreamLink any and all documents, records and/or other information in the

possession of, or otherwise known to, the Customer and related to the Indemnifiable Claim. StreamLink may control the defense and/or settlement of any Indemnifiable Claim, provided that, if applicable, StreamLink may not settle any such Indemnifiable Claim without the obtaining a release of the Customer from such Indemnifiable Claim. If the defense and/or settlement of any Indemnifiable Claim is compromised by the failure of the Customer to comply with the provisions of this §4.2, the Customer shall be liable, to the extent of such failure, for the expenses, costs and/or damages incurred by the Customer.

4.3 Notwithstanding that set forth in §4.2, neither the Customer nor any third-party may seek indemnification from StreamLink for any Indemnifiable Claim that asserts the Software Product infringes upon the intellectual property rights of a third-party if (a) the Customer, the Customer Users and/or any third-party acting on behalf of either of the same failed to install or apply, or failed to have installed or applied, any Update or Upgrade and such assertion of infringement would be, or would have been, invalidated or could not have been brought, or would not have been successful, if such Update or Upgrade was installed or applied, (b) the Customer, the Customer Users and/or any third-party acting on behalf of either of the same used or uses the Software Product in a manner (1) inconsistent with the provisions of the Agreement and/or (2) contrary to its intended use and or purpose and/or (c) such assertion of infringement relates solely to Customer Data.

5. Limitations on Liability; Remedies.

5.1 THE SOFTWARE PRODUCT IS PROVIDED BY STREAMLINK ON AN "AS-IS" BASIS. ALL OTHER WARRANTIES, WHETHER ORAL OR WRITTEN, EXPRESS OR IMPLIED OR CONTRACTUAL OR STATUTORY, ARE EXPRESSLY DISCLAIMED. WITHOUT LIMITATION, STREAMLINK NEITHER REPRESENTS AND WARRANTS, NOR COVENANTS, THAT (a) THE OPERATION AND/OR USE OF THE SOFTWARE PRODUCT WILL BE UNINTERRUPTED OR ERROR-FREE, (b) THE SOFTWARE PRODUCT WILL PERFORM IN EVERY OPERATING ENVIRONMENT, (c) ALL DEFICIENCIES OR ERRORS IN THE SOFTWARE PRODUCT ARE CAPABLE OF CORRECTION OR (d) THE SOFTWARE PRODUCT MEETS THE REQUIREMENTS OF ANY PARTY WHATSOEVER. THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE SPECIFICALLY DISCLAIMED.

5.2 IN NO EVENT SHALL EITHER PARTY'S AGGREGATE LIABILITY FOR ANY CLAIM ARISING OUT OF OR RELATED TO THIS AGREEMENT, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, EXCEED THE FEES PAID BY CUSTOMER TO STREAMLINK IN THE CALENDAR YEAR IN WHICH THE CLAIM IS BROUGHT. THE PARTIES AGREE THAT STREAMLINK WILL BE LIABLE FOR DAMAGES ONLY IF IT FAILS TO EXERCISE ORDINARY CARE, AND THAT IT SHALL BE DEEMED TO HAVE EXERCISED ORDINARY CARE IF ITS ACTION OR FAILURE TO ACT IS IN CONFORMITY WITH COMMERCIALLY REASONABLE PRACTICES.

5.3 NEITHER PARTY HERETO MAY BE HELD LIABLE TO THE OTHER, OR TO ANY THIRD-PARTY, FOR ANY INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, EXEMPLARY OR PUNITIVE DAMAGES (INCLUDING LOST OR ANTICIPATED REVENUES OR PROFITS) ARISING FROM ANY CLAIM RELATING DIRECTLY OR INDIRECTLY TO THE AGREEMENT, WHETHER BASED ON WARRANTY, CONTRACT OR TORT (WHETHER UNDER A THEORY OF NEGLIGENCE, STRICT LIABILITY OR OTHERWISE), EVEN IF AN AUTHORIZED REPRESENTATIVE OF SUCH PARTY IS ADVISED OF THE LIKELIHOOD OR POSSIBILITY THEREOF.

5.4 EACH PARTY HERETO ACKNOWLEDGES THAT THE OTHER PARTY HERETO HAS RELIED UPON THE LIMITATIONS ON LIABILITY SET FORTH IN §4 AND THIS §5 AND, BUT FOR THEIR INCLUSION HEREIN, WOULD NOT HAVE ENTERED INTO THE AGREEMENT.

5.5 In the event an Indemnifiable Claim alleges StreamLink made a misrepresentation in clause (c) of §3.2, StreamLink shall have the right to terminate the Software License as to that portion, or those portions, of the Software Product contemplated in such Indemnifiable Claim and (a) procure for the Customer the right to use that portion, or those portions, of the Software Product contemplated in such Indemnifiable Claim and/or (b) provide a non-infringing substitute that would not give rise to an Indemnifiable Claim, provided, however, that any exercise of such right may not be deemed to limit the applicability of any other limitation on liability set forth in the Agreement.

6. Parties' Obligations.

6.1 The Customer shall (a) use the Software Product in accordance with the Agreement, (b) promptly report to StreamLink any flaws, errors, bugs, defects or other problems in or with the Software Product that it identifies, (c) cause each Customer User to enter into the Click-To-Proceed Agreement or, if the Customer elects not to cause each Customer User to do so, indemnify StreamLink for any liabilities, costs, fees and/or damages that arise out of any claim that StreamLink could have brought against the Customer User if the Customer

User had entered into the Click-To-Proceed Agreement, (d) notify StreamLink of any change to the Customer's Contact Information, (e) comply with the provisions of the Privacy Policy, and (f) complete as reasonably as possible StreamLink's customer onboarding documentation and notify StreamLink of any changes to such documentation.

6.2 Upon StreamLink's reasonable request, the Customer shall (a) act as a reference in marketing and sales initiatives by StreamLink and (b) work with StreamLink to issue press releases and participate in media interviews, case- and market-research studies. Each Party may publicize that it has entered into the Agreement with the other, provided, however, that, except as required by Law or court order, neither Party may (y) disclose the specific terms of the Agreement (including pricing) and/or (z) use the logos or trademarks of the other Party, without the consent of such other Party, which consent may not be unreasonably withheld. For the avoidance of doubt, delivery by either Party of its logo to the other Party shall constitute such delivering Party's consent to use of such logo by such other Party.

6.3 The Customer covenants that any personally identifiable information input into the Software Product by the Customer will be explicitly consented to by the person to whom, or third-party to which, the personally identifiable information belongs.

6.4 The responsibility for transmission to StreamLink of Customer Data shall be borne by the Customer. Customer Data lost by StreamLink following receipt thereof from the Customer shall either be restored by StreamLink from backup media (whether that of StreamLink or the Customer) or shall be reprocessed by StreamLink from the Customer's backup media at no additional charge to the Customer.

7. Confidentiality.

7.1 Each Party may deliver Confidential Information to the other. If a Party receives the Confidential Information of the other, such receiving Party (a) shall use such Confidential Information solely for the purpose of carrying out its obligations according to the Agreement, (b) shall hold such Confidential Information in confidence and take reasonable precautions to protect such Confidential Information (including all precautions that such Party employs with respect to its confidential materials), (c) may not divulge any such Confidential Information or any information derived therefrom to any third-party and (d) shall only divulge such Confidential Information to those of its employees, representatives and Affiliates who have a reasonable need to know such information.

7.2 The provisions of §7.1 may not be applied (a) to any Confidential Information that (1) is or becomes (through no improper action or inaction by the Party receiving the same or any of its employees, representatives or Affiliates) generally available to the public, (2) was in its possession or known by the Party receiving the same prior to receiving it from the Party disclosing the same, (3) was properly disclosed to the Party receiving the same without any obligation of confidentiality or (4) was discovered or created by the Party receiving the same without reliance on such Confidential Information (as shown in the records of such receiving Party) or (b) to disclosures required by Law or court order, provided that the Party receiving such Confidential Information (1) uses reasonable efforts to limit disclosure and to obtain confidential treatment or a protective order with respect thereto, (2) has allowed the Party disclosing such Confidential Information to participate in the proceedings related to such legal or court-ordered requirement (to the extent reasonably practical) and (3) cooperates reasonably with the efforts to contest or limit the scope of such required disclosure of the Party disclosing such Confidential Information.

8. Term & Termination.

8.1 The Agreement shall remain in full force and effect during the Term unless and until it is terminated according to this §8.

8.2 After the Initial Term, the Agreement shall automatically renew for a period of time that is the same as the Initial Term unless a Party elects not to renew the Agreement and notifies the other Party at least 60 days prior to the expiration of the then-current term.

8.3 Either Party may terminate the Agreement if the other Party materially breaches a covenant, representation or warranty made in the Agreement or materially fails to perform, or comply with, its obligations according to the Agreement, by notifying such other Party of such breach or material failure (as the case may be) and, if such breach is not cured within 30 days following receipt of notice thereof, notifying such other Party no less than 30 days prior to the effective date of such termination.

8.4 Either Party may immediately terminate the Agreement by notifying such other Party of such termination if such other Party (a) files a petition in bankruptcy, (b) has filed against it a petition in bankruptcy and such petition is not dismissed within

90 days of being so filed, (c) becomes insolvent according to the Laws of the jurisdiction in which it was formed or (d) makes an assignment, or enters into some other arrangement, for the benefit of its creditors.

8.5 Immediately upon the termination of the Agreement, (a) the Customer may have no further right, title or interest in the Software Product or any part thereof, including any license in either of the same, (b) neither Party may use the other Party's Confidential Information and shall destroy or return, at the sole and absolute discretion of the Party disclosing such Confidential Information, all copies thereof and (c) each Party shall immediately pay to the other Party all amounts that are due and payable hereunder.

8.6 The provisions of §§1.3, 1.4, 2.2, 2.3, 4, 5, 6, 7 and 8.5, the provisions of this §8.6 and, as and where applicable, the provisions of §§9 and 10 shall survive any termination of the Agreement.

9. Defined Terms.

"**Addendum**" means an addendum to the Agreement in substantially the form attached thereto as **Exhibit B**.

"**Add-On Fee**" means (a) the amounts set forth in the Business Terms as the amounts due for each of the Add-Ons to be provided by StreamLink and/or (b) the amount due for any services StreamLink agrees to provide according to §1.4.

"**Add-Ons**" means the additional services StreamLink provides (a) that are selected in the Business Terms under "Add-Ons" and/or (b) any other services StreamLink agrees to provide according to §1.4.

"**Affiliate**" means a person, entity or association who or that (as the case may be) directly, or indirectly through one or more intermediaries, controls, or is controlled by, or is under common control with, the specified person, entity or association.

"**Agreement**" means the Customer Agreement entered into by and between StreamLink and the Customer and includes each Addendum (if any).

"**Amounts Due**" means any amounts due to StreamLink, including any Subscription Fee, Set Up Fee, Add-On Fee and/or Processing Fee.

"**Business Terms**" means the business terms applicable to the Agreement and set forth (a) on the page signed by StreamLink and the Customer and/or (b) in each Addendum.

"**Click-To-Proceed Agreement**" means StreamLink's Click To Proceed Agreement, which may be found Software Product login page.

"**Contact Information**" means (a) with respect to the Customer, the Customer Administrator or the information set forth in the Agreement beneath the signature of its authorized representative(s) and (b) with respect to StreamLink, the information set forth in the Agreement beneath the signature of its authorized representative.

"**Customer**" means the party with which StreamLink entered into the Agreement.

"**Customer Administrator**" means the individual set forth in the Agreement who is the Customer's main point of contact for StreamLink.

"**Customer Confidential Information**" means (a) information relating to the Agreement that is not generally known to the public or that constitutes a trade secret, (b) information that is owned, developed or acquired by the Customer, including the Customer's financial data, business plans, customer information, software, programming, systems and use documentation, technical information, technology, designs, ideas, inventions, data, data formats and files, and all copies and tangible embodiments thereof and (c) Customer Data.

"**Customer Data**" means all data and media provided to StreamLink or otherwise input into or using the Software Product by the Customer.

"**Customer User**" means an individual who the Customer, directly or indirectly, authorizes to use the Software Product.

"**Confidential Information**" means StreamLink Confidential Information and Customer Confidential Information.

"**Indemnifiable Claim**" means a claim for damages resulting from any material inaccuracy or breach of the representations and warranties made by StreamLink in §3.2.

"**Initial Term**" means the number of years set forth in the Business Terms as the "Initial Term" and is (a) the initial period during which the Agreement is to be in effect and (b) if applicable, the initial period during which the an Addendum is to be in effect.

"**Invoice Period**" means the 30-day period that follows the day StreamLink delivers the invoice contemplated in §1.3.

"**Law**" means any statute, law, ordinance, regulation, rule, code, order, constitution, treaty, common law,

judgment, decree, other requirement or rule of law of any federal, state or local government or any agency or instrumentality thereof and any arbitrator, court or tribunal of competent jurisdiction.

"**Party**" means either StreamLink or the Customer.

"**Privacy Policy**" means StreamLink's Privacy Policy, which may be found at www.streamlinksoftware.com, as the same may, from time-to-time, be amended by StreamLink in its sole discretion.

"**Processing Fee**" means StreamLink's then-applicable processing fees.

"**Renewal Term**" means (a) the period immediately following the Initial Term and (b) each period immediately following each period that follows the Initial Term.

"**Set Up Fee**" means an amount equal to that set forth in the Business Terms as the "Set Up Fee" (if any) and is the amount to be paid to StreamLink by the Customer in accordance with §1.

"**Signature Date**" means (a) the "Signature Date" set forth in the Agreement and is the day as of which the Agreement is to be in effect and (b) if applicable, the "Signature Date" set forth in an Addendum and is the day as of which an Addendum is to be in effect.

"**Software License**" means a limited, nonexclusive and nontransferable license for (a) the Customer Users to use the Software Product in accordance with the Agreement and (b) any independent contractor engaged by the Customer for the limited purpose of providing to the Customer computer maintenance and/or support services to use the Software Product to provide such maintenance and/or support services.

"**Software Product**" means StreamLink's BoardMax, board management software platform, and AmpliFund, a grant management software platform, software products that are made available to the Customer, including the Add-Ons identified in the Business Terms, if applicable, and any third-party software embedded therein, any Updates and any Upgrades.

"**Standard Terms**" means these Standard Terms & Conditions.

"**StreamLink**" means StreamLink Software Inc., a Delaware corporation.

"**StreamLink Confidential Information**" means (a) information relating to the Agreement that is not generally known to the public or that constitutes a trade secret, (b) information that is owned, developed or otherwise acquired by StreamLink, including StreamLink's financial data, business plans, customer information, software, programming, systems and use documentation, technical information, technology, designs, ideas, inventions, data, data formats and files, and all copies and tangible embodiments thereof, (c) the Software Product and (d) any software, software modifications, derivative works, processes, configurations, system referenced data, procedures and other intellectual property rights relating to data processing and information technology developed or held by StreamLink in the performance of its obligations according to the Agreement.

"**Subscription Fee**" means an amount equal to that set forth in the Business Terms as the "Subscription Fee" (if any) and is the amount to be paid to StreamLink by the Customer in accordance with §1.

"**Support Services**" means (a) from 8:00 AM until 8:00 PM Eastern Time, Monday through Friday (except generally recognized federal holidays), technical support for the Customer Administrator and any Customer User via toll-free telephone call and/or online chat and (b) 24/7 online submission of support requests, feature requests and bug reports.

"**Term**" means the Initial Term, any Renewal Terms (if applicable) and the period during which any Addendum is in effect.

"**Update**" means any update, feature release (e.g., 2.0 to 2.1), patch release (e.g., 2.0.1 to 2.0.2), maintenance release, bug fix or modified form of the Software Product that performs comparable or improved functionality and which is not an Upgrade.

"**Upgrade**" means any new version or major release (e.g., 2.0 to 3.0) of the Software Product, including any changes to the Software Product that (a) substantially increase the speed, efficiency or ease of use of the Software Product or (b) add additional capabilities to, or otherwise improve the functions of, the Software Product.

10. General Provisions.

10.1 Each Party shall comply in all material respects with all applicable Laws in performing its obligations according to the Agreement.

10.2 Any notice required or permitted to be delivered to either of the Parties according to the Agreement shall be (a) delivered according to such Party's Contact Information and (b) deemed effective (1) upon receipt, when delivered personally or by courier, (2) the day delivered, if delivered by a reputable overnight delivery service, (3) upon delivery, if delivered via email and delivery is confirmed or

(4) 48 hours after being deposited for delivery via certified or registered mail with postage prepaid. Notice of any change to the Contact Information shall be given according to this §10.2.

10.3 The Agreement, when taken together with the Privacy Policy and each Addendum (if any), constitutes the entire agreement between the Parties as to the subject matter hereof and supersedes all prior documents, negotiations and drafts of such parties with respect to such subject matter, whether written or verbal. No provision of the Agreement may be construed against either Party by reason of the drafting or preparation thereof.

10.4 Any term of the Agreement may be amended, waived, terminated or discharged only with the consent of both of the Parties. The failure of either Party to insist upon the performance of any of the terms or conditions contained in the Agreement, and the failure of either Party, to exercise any right hereunder, may not be construed as a waiver or relinquishment of the future performance of any such term or condition or the future exercise of such rights.

10.5 If any provision of the Agreement is held to be unenforceable, the Parties shall renegotiate each such provision in good faith in order to maintain the economic position enjoyed by each Party prior to such holding with respect to each such provision rendered unenforceable. If the Parties cannot agree upon an enforceable replacement for such provision, then (a) such provision shall be excluded from the Agreement, (b) the balance of the Agreement shall be interpreted as if such provision were so excluded and (c) thereafter, the Agreement shall be enforceable in accordance with its terms.

10.6 Neither Party may assign the Agreement, in whole or in part, by operation of Law or otherwise, without the other Party's consent, such consent to not be unreasonably withheld, provided, however, that either Party may assign the Agreement without the other Party's consent if such assignment is made as part of the purchase of all or substantially all of that Party's business or as part of a merger, consolidation or reorganization there. Any attempt to assign the Agreement other than in accordance with this §10.6 shall be null and void and of no legal force or effect. The Agreement shall be binding upon and shall inure to the benefit of the parties successors and permitted assigns.

10.7 Neither Party may be held liable for its failure to perform hereunder or for any loss or damage due to causes beyond its reasonable control, including governmental requirements, inability to obtain required export licenses, work stoppages, fire, civil disobedience, embargo, war, terrorism, riots, rebellions, earthquakes, strikes, floods, water and the elements, inability to secure equipment, raw materials or transport or similar occurrences.

10.8 Unless the context clearly requires otherwise, (a) the singular shall be deemed to include the plural and vice versa, (b) reference to any agreement, document or instrument shall be deemed to refer to such agreement, document or instrument as may be amended or modified and in effect from time to time, (c) "hereunder," "hereof," "hereto" and words similar thereto shall be deemed references to the Agreement as a whole and not to any particular provision hereof, (d) the words "include" and "including" shall be deemed to mean "without limitation" and shall be interpreted not to limit the generality of any description preceding such term, (e) with respect to the determination of any period of time, "from" means "from and including" and "to" means "to but excluding" and (f) any reference to a "§" or "§§" in the Agreement shall be construed as a reference to a section of the Agreement.

10.9 Neither the Agreement nor any provision contained herein may be construed as creating or constituting a partnership, joint venture or agency relationship between the Parties. The relationship created hereby is strictly that of licensor and licensee. For the avoidance of doubt, neither Party has the power or authority to, and no Party may, assume or create any obligation or responsibility on behalf of the other.

10.10 The Agreement may be executed in 2 or more counterparts (including by electronic transmission), each of which shall be deemed an original and all of which together shall constitute a single instrument

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3. Section V - SYSTEM REQUIREMENTS

3.1 SECURITY STANDARDS

3.1.1 System shall meet State security standards for transmission of personal information as outlined in NRS 205.4742 and NRS 603A.

All data transferred to and from AmpliFund, including file transfers, is encrypted using SHA-256 encryption over SSL/HTTPS. Data at rest is encrypted using 256-bit AES encryption.

3.1.2 Protection of sensitive information shall include the following:

3.1.2.1 Sensitive information in existing legacy applications shall encrypt data as is practical.

AmpliFund supports data encryption in transit and at rest, including data imported from existing legacy applications. All data transferred to and from AmpliFund is encrypted using SHA-256 encryption over SSL/HTTPS. Data files uploaded to the platform will be encrypted prior to storage.

3.1.2.2 Confidential personal data shall be encrypted.

All data transferred to and from AmpliFund, including file transfers, is encrypted using SHA-256 encryption over SSL/HTTPS. Data at rest is encrypted using 256-bit AES encryption.

3.1.2.3 Any electronic transmission of personal information shall comply with NRS 603A.215 (2 & 3).

Subsection 1 of NRS 603A.215 does not apply to AmpliFund. AmpliFund does not accept payment card data. AmpliFund is in compliance with subsections 2 and 3 as all data transferred to and from AmpliFund, including file transfers, is encrypted using SHA-256 encryption over SSL/HTTPS. Data at rest is encrypted using 256-bit AES encryption.

3.1.2.4 Sensitive data shall be encrypted in all newly developed applications.

All data within AmpliFund is encrypted in transit and at rest.

3.1.3 All information technology services and systems developed or acquired by agencies shall have documented security specifications that include an analysis of security risks and recommended controls (including access control systems and contingency plans).

AmpliFund is hosted within the Microsoft Azure platform and Microsoft manages all operational aspects of the Azure data centers. Azure data

centers are regularly audited and maintain a number of certifications related to the security and control environment including SOC 1, SOC 2, SOC 3, ISO 27001, and HIPAA. Please see Exhibit A for the associated SOC 3 report.

More information regarding information security and compliance within the Microsoft Azure platform is available at: https://azure.microsoft.com/en-us/support/trust-center/.

3.1.4 Security requirements shall be developed at the same time system planners define the requirements of the system. Requirements shall permit updating security requirements as new threats/vulnerabilities are identified and/or new technologies implemented.

As a Commercial-Off-the-Shelf (COTS), SaaS solution, AmpliFund is fully developed and already used by hundreds of organizations for their grants management needs. As such, AmpliFund already adheres to stringent security requirements. In the unlikely event that the State identifies additional security requirements specific to their organization, the AmpliFund team will work with the State to meet those needs.

AmpliFund is a secure application that requires all users, whether grantees or staff, to log in with their unique user ID and password before being able to access the system. Once logged in, AmpliFund utilizes role-based security and a granular security model to provide user access to modules, features, and records within the system. For details regarding the security roles within AmpliFund, please see Exhibit B.

In conjunction with Microsoft, security is maintained and updated against intrusion, vulnerabilities, and malware as appropriate.

AmpliFund is hosted within the Microsoft Azure platform is approved for the Microsoft Azure Government Cloud. Microsoft has completed the FedRAMP audit and certification processes and the Azure and Azure Government platforms have been granted a Provisional Authority to Operate (P-ATO) at the Moderate Impact Level. Azure data centers are regularly audited and maintain a number of certifications related to the security and control environment including SOC 1, SOC 2, SOC 3, ISO 27001, and HIPAA. All data transferred to and from AmpliFund, including file transfers, is encrypted using SHA-256 encryption over SSL/HTTPS. Data at rest is encrypted using 256-bit AES encryption.

More information regarding information security and compliance within the Microsoft Azure platform is available at: https://azure.microsoft.com/en-us/support/trust-center/.

More information related to Microsoft Azure data centers is available at: https://azure.microsoft.com/en-us/overview/datacenters/

3.1.5 Security requirements and evaluation/test procedures shall be included in all solicitation documents and/or acquisition specifications.

In addition to the security requirements outlined above, more information regarding information security and compliance within the Microsoft Azure platform is available at: https://azure.microsoft.com/en-us/support/trust-center/.

AmpliFund is supported by a dedicated QA team responsible for all product testing. The group oversees automated unit tests and performs manual feature testing for all new and revised functionality. The product team performs final end-to-end user testing and sign-off prior to all product releases.

The AmpliFund team has also utilized user groups consisting of clients, internal staff, and product designers to provide input into product specifications and design, as well as to review the completed product.

3.1.6 Systems developed by either internal State or contracted system developers shall not include back doors, or other code that would cause or allow unauthorized access or manipulation of code or data.

AmpliFund does not include back doors, or other code that would cause or allow unauthorized access or manipulation of code or data.

3.1.7 Security specifications shall be developed by the system developer for approval by the agency owning the system at appropriate points of the system development or acquisition cycle.

AmpliFund is a fully developed, COTS solution. Security specifications will be provided to the State for approval at the appropriate point in the acquisition cycle.

3.1.8 All system development projects shall include a documented change control and approval process and shall address the security implications of all changes recommended and approved to a particular service or system. The responsible agency shall authorize all changes.

All AmpliFund development projects adhere to a stringent internal change control and approval process. Security implications are thoroughly reviewed prior to development project kickoffs, and all system updates/changes are implemented in a way that adhere to AmpliFund's stringent security requirements.

AmpliFund is updated during a weekly maintenance window for patches and bug fixes. In addition, there are generally two major feature updates per year. The AmpliFund development team utilizes continuous integration and the AmpliFund QA team tests and verifies all patches and new functionality and performs regular regression testing.

As a SaaS solution, all platform upgrades/changes are made available to all AmpliFund clients at no additional cost. Each agency will have the ability to utilize the product upgrades/changes as they see fit.

3.1.9 Application systems and information that become obsolete and no longer used shall be disposed of by appropriate procedures. The application and associated information shall be preserved, discarded, or destroyed in accordance with Electronic Record and Record Management requirements defined in NRS and NAC 239, Records Management.

At the conclusion of the contract with the State, provided there are no new contracts and the contract is not extended, data within the State's AmpliFund instance will be preserved, discarded, or destroyed in accordance with Electronic Record and Record Management requirements defined in NRS and NAC 239, Records Management.

3.1.10 Software development projects shall comply with State Information Security Consolidated Policy 100, Section 4.7, Software Development and Maintenance and State Standard 131, "Security for System Development".

All software development included within the scope of this project will comply with State Information Security Consolidated Policy 100, Section 4.7, Software Development and Maintenance and State Standard 131, "Security for System Development".

3.1.10.1 Separate development, test and production environments shall be established on State systems.

The State will have access to separate development, test, and production AmpliFund environments. Data can be refreshed from the production environment to the development or test environments upon request to the AmpliFund team. The AmpliFund team will work with the State to copy configurations and system-table type data from development or test to production following approval.

3.1.10.2 Processes shall be documented and implemented to control the transfer of software from a development environment to a production environment. New hardware/software is not introduced into a production environment until it is fully tested and accepted by the State.

Control processes for the transfer of AmpliFund from a development environment to a production environment are thoroughly documented by the AmpliFund team.

The AmpliFund team will create test instances to perform both test and final data loads which will allow the State to validate the accuracy and completeness of the migrated data. In addition, UAT will be performed with this migrated data to ensure a

comprehensive application is approved and accepted by the State before moving to a production environment.

3.1.10.3 Development of software and tools shall be maintained on computer systems isolated from a production environment.

Development of AmpliFund is maintained in a development environment isolated from the production environment(s).

3.1.10.4 Access to compilers, editors and other system utilities shall be removed from production systems.

Access to compilers, editors, and other system utilities is unavailable from the production environment(s).

3.1.10.5 Controls shall be established to issue short-term access to development staff to correct problems with production systems allowing only necessary access.

AmpliFund maintains a dedicated DevOps team whose responsibility it is to create patches and bug fixes. Only certain members of the DevOps team have access to deploy code to the production environment. None have access to make changes to the Azure configuration or infrastructure.

The AmpliFund DevOps team also utilizes a weekly maintenance window that occurs on Wednesdays between 10pm and midnight EST in order to deploy patches. Every effort is made during this timeframe to avoid any system unavailability. Controls are in place to ensure that only necessary access is granted.

3.1.10.6 Security requirements and controls shall be identified, incorporated in and verified throughout the planning, development, and testing phases of all software development projects. Security staff shall be included in all phases of the System Development Lifecycle (SDLC) from the requirement definitions phase through implementation phase.

As an already existing SaaS solution, AmpliFund has established security requirements and controls in place throughout the planning, development, and testing phases. Security staff (quality assurance) are included in all phases of the SDLC, from requirement definitions through implementation.

3.2 REQUIREMENTS MATRIX

Vendor shall:

3.2.1 Present the platform requirements for efficient operation of the system;

3.2.2 Review the requirements matrix carefully to insure that the proposed system design addresses all of the requirements;

3.2.3 Tie each data element/function to the vendor's project plan by task number; and

3.2.4 Respond to all of the requirements by properly coding and indicating how the requirement is satisfied. The proposed costs and project plan shall reflect the effort needed to satisfy the requirements.

3.2.5 Identify, for each of the system requirements identified in the requirements matrix, whether it is:

Condition	Description
S – Standard Function	The proposed system fully satisfies the requirement as stated. The vendor shall explain how the requirement is satisfied by the system.
W – Workflow or System Configuration Required	Current functionality of the proposed system exists in the system and can be modified by a system administrator to meet this requirement.
M – Modification Required	The proposed system requires a modification to existing functionality to meet this requirement which requires a source code modification. The system shall be modified to satisfy the requirements as stated or in a different format. The vendor shall explain the modifications and include the cost of all modifications above and beyond the base cost in ***Attachment I, Project Costs***.
F – Planned for Future Release	This functionality is planned for a future release. The vendor shall explain how the requirement shall be satisfied by the system and when the release shall be available.
C – Custom Design and Development	The proposed system requires new functionality to meet this requirement which requires a source code addition. The vendor shall explain the feature and its value, and include any cost above and beyond the base cost in ***Attachment I, Project Costs***.

Condition	Description
N – Cannot Meet Requirement	The proposed system shall not satisfy the requirement. The vendor shall explain why the requirement cannot be satisfied.
O – Other Software	If the requirement is to be satisfied through the use of a separate software package(s), vendors shall identify those package(s) and describe how the functionality is integrated into the base system.

3.2.6 Identify whether each requirement is in the firm fixed price included within the cost proposal.

3.2.7 Describe how the proposed system meets the requirements specified within this RFP.

3.2.8 Provide detail with narrative and screen shots to depict task compliance.

AmpliFund is an already built system that meets the requirements outlined in the matrix below. Each data element/function has been tied to the appropriate task number on the project plan, indicating the high-level phase of the implementation plan during which that functionality will begin. Again, it is important to note that the functionality is already available within the platform out of the box, and does not need to be developed.

All of the functionality outlined below is included in the overall fixed, firm price. Please see Exhibit C for screenshots depicting AmpliFund's ability to meet these requirements.

For an amount not to exceed $200,000 annually the full-life cycle grant management system will include:

Requirements Matrix

	TASK	Condition	NO	Details
1	**Grant Acquisition Provide Potential Grant Opportunities**			
	In database?	S	2	***AmpliFund offers a Research Module that provides access to thousands of federal, state, corporate, and private foundation grants, including grants.gov opportunities. The module allows user-defined saved search criteria to run in the background and auto-notifies the user when new potential opportunities become available. Additionally,***

				once an opportunity is identified, it can be seamlessly moved to the Pre-Award section of AmpliFund in order to initiate the record definition and grant application process. The AmpliFund research module offers the benefit of extensive opportunities and automatic data population into AmpliFund Pre-Award, which means more grant revenue opportunities, with less work—greatly expanding capacity and improving the State's ability to successfully respond to external funding opportunities. Furthermore, when an opportunity is won, the budget and performance plans created for the grant application can be seamlessly copied over to AmpliFund Post-Award for ongoing management of the grant.
	Searchable database?	S	2	***The database of grant opportunities available within the AmpliFund Research module is searchable by a number of parameters including categories, administrating states, eligibility, funder types, and through free-text.***
	Project / Agency Goals & Metrics search?	S	2	***The AmpliFund Research module allows users to search funding opportunities by category, eligibility, funder types, date ranges, and keyword/full text search. The AmpliFund Research text search is a search across all text fields of the grant opportunity record and typically covers the type of project, agency goals, and metrics looking to be achieve.***
	Provide electronic summary of opportunity?	S	2	***The AmpliFund Research module provides an electronic summary for all opportunities within the database.***
	Provide previous award information?	F	Q1 2018	***AmpliFund does not currently provide previous award information. However, this item is on the product roadmap and AmpliFund is currently working with several data providers to incorporate previous award data into the Research Module. It is anticipated this feature will be available in Q1 2018, and will be provided at no additional cost.***
	Reviewed by full-time research staff?	S	2	***The AmpliFund Research Module is supported by a partner organization solely focused on identifying and curating grant opportunities on a daily basis, and is reviewed by full-time research staff.*** ***The AmpliFund Research Module is the widest-reaching source of grants opportunities, representing billions in funding from federal***

				agencies, state and local governments and private foundations from roughly 16,000 funding sources. Using proprietary research technology, combined with a large team of researchers who collect opportunities from thousands of different sources and data feed, AmpliFund offers the most comprehensive database of current funding opportunities.
	Federal grants?	S	2	***The AmpliFund Research Module provides access to federal grants, including grants.gov opportunities and over 50 other Federal Agencies that do not post their opportunities on grants.gov.***
	Foundation grants?	S	2	***The AmpliFund Research Module provides access to foundation grant opportunities.***
2	**Grant Acquisition Provide Sharable Workspace and Workflow to Build Grant Application**			
	Shared workspace?	W	2	***AmpliFund provides access for an unlimited number of users, enabling the key stakeholders involved in a project/grant to work on application materials collaboratively. As a SaaS platform, AmpliFund captures all changes within the system in real-time, ensuring that users are always working on the most recent/updated version of the application materials. Additionally, the configurable AmpliFund workflow engine can be leveraged to define and enforce all pre-award document collection and review and approval processes. This will help the State create the proper framework for compliance and drive accountability for all planning and application requirements.*** ***When a new grant opportunity is identified, planning the grant is a key functionality in AmpliFund. Starting at the highest level with a definition of the grant or project requirements and drilling all the way down into the specific budget and performance requirements of the grant, AmpliFund addresses all the details of a grant or project. The project or grant plan is built in a shared workspace within AmpliFund, through individual goal and line***

				item definition. Each performance plan is made up of the individual programmatic requirements of the grant and each budget plan is made up of the individual financial requirements of the grant, both non-personnel and personnel. Both of these items—either performance or budget—are then assigned to the person responsible for the item once the grant or project is awarded. ***When complete, budget and performance plans can be exported in narrative report form to be used in the grant application. Planning grants and projects in this fashion allows the centralization of all pertinent details in one location.***
	Required workflow / approval?	W	2	***As described above, the AmpliFund workflow engine will support the required workflow processes for information routing and approval and document collection necessary for the State to create grant/project applications in a way that is compliant with internal requirements.***
	Proposal budget development?	W	2	***Proposal budgets are developed within AmpliFund and fully configurable by grant and/or program. Proposal budgets support categorization; personnel and non-personnel line items; matching, indirect costs and program income.*** ***Upon receipt of the award, AmpliFund provides a simple process for copying the pre-award grant budget to the active awarded grant for the purpose of managing financial activities over the life of the grant.***
	Track application development?	W	2	***AmpliFund will display a comprehensive, real-time view into the application development process.*** ***The workflow module contains a full audit log of activity, and will show all of the application development steps that have been completed and by whom. The grant budget and performance plans built within AmpliFund are updated in real time and will provide timely visibility into the completion of those items as related to the overall application submission requirements. In addition, the Documents section of the pre-award grant record will list***

				all of the application documents collected to date.
	Submission win-rates?	S	2	***The Award Status Report available within AmpliFund provides a comprehensive overview of the entire grant portfolio, including a calculation of percentage and dollar hit rates.***
3	**Grant Solicitation For Federal pass-thru or State Funds Published to a public portal for application**			
	Create a state-level grant solicitation?	S	4	***The AmpliFund Competitive Award Management (CAM) module provides functionality to support organizational funding processes, including the creation of state-level grant solicitations.*** ***The AmpliFund CAM module allows for the creation of RFPs and the management of solicitation, application review and scoring, and awarding processes. The module features a web-based application builder that provides complete control over building online applications and does not require programming knowledge. It includes the ability to define scoring parameters specific to the application and to each question.*** ***The CAM module integrates with Workflow to allow for the definition of review and scoring processes that support the State's existing or desired processes.***
	Portal for sub-recipients to submit application?	S	4	***The AmpliFund CAM module includes an Applicant Portal, which allows external organizations to find and review funding opportunities created through AmpliFund. Sub-recipients can use the portal to review opportunities, complete and submit online application forms, and monitor review processes and final decisions. Organizations that win awards use the AmpliFund Recipient Portal to track their programmatic and fiscal progress and submit progress reports.***
	Portal for sub-recipient application evaluation?	W	4	***AmpliFund enables the review and evaluation of sub-recipient applications by one or multiple reviewers, on a per-funding opportunity basis. The AmpliFund workflow engine is fully configurable and used to route each***

				application through the evaluation and final review process. When an application is in a review queue in the workflow, each reviewer can numerically score the application according to the scoring scale defined for each question during the application creation phase. Reviewers also have the ability to add comments to each application form within the application packet. Comments can be marked as public or private, with public comments enabling collaboration among reviewers.
	Portal for sub-recipient grant award?	S	4	***AmpliFund allows organizations to create and manage grant sub-awards. Whether the awarding process is competitive or non-competitive, award recipients can be allocated a Recipient Access License to view, manage, and record activity against their award. As the lead recipient, this data will roll-up to the State (or appropriate agency) in order to provide accurate and timely visibility into the performance and current timeline of the sub-recipient.***
	Provide data regarding submission of awards?	S	4	***AmpliFund provides data regarding the submission of awards. Specifically, the AmpliFund Reporting Engine features an Opportunity Summary Report which displays a comprehensive overview of the applications submitted to the State. All reports included within the AmpliFund Reporting Engine are exportable to Excel/CSV.***
4	**Sub-grant Recipients and Award**			
	Task and deliverable tracking?	S	4	***Sub-grant recipients receive a Recipient Access License that enables them to track both tasks and deliverables associated with their grant(s) and/or program(s).*** ***Note that budget and performance plans submitted by sub-recipients via the Applicant Portal during the application phase are seamlessly copied over for post-award task and deliverable tracking when an opportunity is won.*** ***AmpliFund also supports the creation of tasks directly associated with specific grant activity (for both grants and grant components). Reminder emails are sent at***

				organizationally identified intervals and can be synced with any calendar system. ***In addition, AmpliFund supports an integrated calendar function that allows for tracking of impending deadlines, appointments, reminders, tasks, and other events as needed. the State has the ability to set reporting intervals for all sub-recipients and sub-recipients will receive reminders prior to reporting being due.***
	To-date expenditures / draw-downs?	S	4	***AmpliFund enables sub-recipients (as well as the State) to fully manage all financial aspects of their awards, including expenditures and draw-downs. Expenses are tracked against the budget created within the system throughout the life of the award. AmpliFund displays budget totals by line item and category, year-to-date expenses, and match requirements if applicable.*** ***AmpliFund stores extensive budget data associated with grant(s), including data for grant totals, personnel and non-personnel costs, indirect costs, and match. This data is managed during the life of the grant to present, in real time, an accurate picture of budget status and overall grant performance.*** ***AmpliFund also tracks payment requests, payments, and cash receipts which allows for full cycle financial tracking and visibility. Overall grant funds utilization (total draw-down), remaining funds and other key metrics are available via grant dashboards and various financial reports.***
	Archive supporting documentation?	S	4	***AmpliFund provides unlimited upload and storage of documents and records and does not require separate archiving processes. Many records types within the system support a status that removes them from the default views. This effectively archives the records without removing them from the system.***
	Match and/or Indirect tracking?	S	4	***As described above, AmpliFund's extensive financial management capabilities support match and indirect tracking.***
	Outcome performance measurements?	S	4	***Performance plans built within AmpliFund track programmatic outcome performance measurements and deliverables. Note that performance plans submitted by sub-***

				recipients via the Applicant Portal during the application phase are seamlessly copied over for post-award outcome performance measurement tracking when an opportunity is won. ***Performance plans contain specific performance metrics that must be hit and conditions that the sub-recipient must be in compliance with during the program. AmpliFund will measure sub-recipients' progress, in addition to the State's overall progress, against these performance and compliance goals over the life of the grant.***
	Interface data with Nevada's financial management system?	S	4	***AmpliFund has an existing REST API that can be leveraged to interface with the State's financial management system, and any other the State system desired. Financial data can be entered into AmpliFund and pushed to the State's finance management system via the API, or vice versa. AmpliFund also allows for the individual or batch update of grant records by flat-file import. A record of payment authorizations, payments, cash receipts, etc. can be stored in AmpliFund so that a full picture of grant activity and overall performance is available in one central repository. During implementation, the AmpliFund team will work with the State to determine the optimal method for integration based on the State's business processes and various systems of record.***
	Interface data with Nevada's contract management system?	S	4	***AmpliFund is platform agnostic and has an existing REST web API that can be leveraged to interface with the State's contract management system, or any other system desired.***
	View sub-recipient cross-agency data?	S	4	***Sub-recipient grant financial and performance data will be visible in a number of different ways. Individual sub-recipient grants/programs can be monitored using data reported directly through AmpliFund. This monitoring is generally performed by the program manager at the funding agency.*** ***At the State level, a number of reports and visualizations exist to show cumulative sub-recipient financial and programmatic performance across grants/programs and agencies.***

	Single audit monitoring tools?	S	4	***AmpliFund serves as a central repository for all grant/program data and documentation, which will support the State' fulfillment of single audit (OMB A-133) requirements, as well as other audit requirements the State may have. The ability for the system to capture all budget related information (plans, expenses, supporting documentation, etc.) and performance information (performance goals, actual outcomes, supporting documentation, etc.) allows AmpliFund to support both internal users and the auditors throughout the audit lifecycle.*** ***AmpliFund records an audit trail of all user activity within the system, which is available for administrators to review and/or export. AmpliFund also maintains a full audit trail of all workflow activity on a per-item basis, which tracks all workflow actions on the item from item inception through closeout.***
	FFATA Transparency monitoring tools?	S	4	***AmpliFund supports the generation of common federal reports including the FFATA, SF-425, SF-270, and SEFA.***
5	**Post-award Grant Management**			
	Track real-time, budget-to-actual expenditures?	S	3	***As described above, AmpliFund tracks budget-to-actual expenditures in real-time via budget plans built directly within the platform.***
	To-date draw-down and reconciliation?	S	3	***AmpliFund enables the State to fully manage all financial aspects of their grants, including expenditures and draw-downs, and supports reconciliation activities and reporting. Expenses are tracked against the budget created within the system throughout the life of the award. AmpliFund displays budget totals by line item and category, year-to-date expenses, and match requirements if applicable. At period closeout, AmpliFund provides a streamlined process for calculating period expenditures and indirect costs and generating a payment request. Cash receipt records, created when a payment from the funder is received, can be reconciled back to each payment request.***
	Track program activity/tasks?	S	3	***Performance plans built within AmpliFund will track program activities/tasks in real time, throughout the life of the grant/program. The***

				AmpliFund platform also has an integrated workflow engine to support internal business processes, including task-routing for program activities. The workflow engine is extremely flexible and fully configurable through the AmpliFund interface. ***In addition, AmpliFund supports the creation of tasks directly associated with specific grant activity (for both grants/programs and grant/program components). These tasks can be assigned to individuals and routed through task execution and review workflows. The calendar function within AmpliFund allows for tracking of impending deadlines, appointments, reminders, tasks, and other events as needed. Reminder emails are sent at organizationally identified intervals and can be synced with any calendar system.***
	View organizational spending?	S	3	***AmpliFund provides a real-time view of organizational spending via budget plans built directly within the platform. Expenses are tracked against the budget throughout the life of the award. The grant budget is fully configurable by grant and/or program and supports categorization; personnel and non-personnel line items; and matching, indirect and program income. AmpliFund displays budget totals by line item and category, year-to date-expenses, and match requirements, if applicable.***
	Track allocations by activity within each grant program?	S	3	***The AmpliFund Project Module allows grants to be combined or segmented into individual projects for the purposes of tracking allocations and program performance by initiative.***
	Standard data reporting?	S	3	***The AmpliFund Reporting Engine has a library of standard reports that allow organizations to report on all aspects of their grant and award portfolio. Each report contains configurable input parameters and a highly interactive report viewer that enable users to filter results, interact with visualizations, drill-down into the underlying data, and export data to excel. For details regarding the configurable report templates within AmpliFund, please see Exhibit D.***
	Customized data reporting?	W	3	***The AmpliFund Reporting Engine also allows for customized data reporting. Organizational data is available within the AmpliFund data***

				mart to be queried and visualized through the interactive report viewer. Impactful reports and dashboards can be created using data visualizations such as bar charts, column charts, line charts, pie charts, tables, matrices, gauges, and maps. Published reports can be made available globally within the organization or limited to specific user groups or roles. Details regarding the custom reporting capabilities within AmpliFund have been outlined in Exhibit E.
	Historical audit log of changes to project?	S	3	***AmpliFund records an audit trail of all user activity within the system, which is available for administrators to review and/or export. AmpliFund also maintains a full audit trail of all workflow activity on a per-item basis, which tracks all workflow actions on the item from item inception through closeout.***
	Outcome performance measurements?	S	3	***Performance plans built within AmpliFund track programmatic outcome performance measurements and deliverables for lead recipients (the State) in the same way that they track outcome performance deliverables for sub-recipients. Note that performance plans submitted by sub-recipients via the Applicant Portal during the application phase are seamlessly copied over for post-award outcome performance measurement tracking when an opportunity is won.*** ***Performance plans contain specific performance metrics that must be hit and conditions that the sub-recipient must be in compliance with during the program. AmpliFund will measure sub-recipients' progress, in addition to the State's overall progress, against these performance and compliance goals over the life of the grant.***
	Interface data with Nevada's financial management system?	S	3	***AmpliFund has an existing REST API that can be leveraged to interface with the State's financial management system, and any other the State system desired. Financial data can be entered into AmpliFund and pushed to the State's finance management system via the API, or vice versa. AmpliFund also allows for the individual or batch update of grant records by flat-file import. A record of payment authorizations, payments, cash receipts, etc. can be stored in AmpliFund so that a full***

				picture of grant activity and overall performance is available in one central repository. During implementation, the AmpliFund team will work with the State to determine the optimal method for integration based on the State's business processes and various systems of record.
	Interface data with Nevada's contract management system?	S	3	***AmpliFund is platform agnostic, and has an existing REST web API that can be leveraged to interface with the State's contract management system, and any other system desired.***
	Match and/or Indirect track & reconciliation?	S	3	***AmpliFund enables organizations to fully manage all financial aspects of their awards, including expenditures and draw-downs. Expenses are tracked against the budget created within the system throughout the life of the award. AmpliFund displays budget totals by line item and category, year-to-date expenses, and match requirements if applicable.*** ***AmpliFund stores extensive budget data associated with grant(s), including data for grant totals, personnel and non-personnel costs, indirect costs, and match. This data is managed during the life of the grant to present, in real time, an accurate picture of budget status and overall grant performance.*** ***AmpliFund also tracks payment requests, payments, and cash receipts which allows for full cycle financial tracking and visibility. Overall grant funds utilization (total draw-down), remaining funds and other key metrics are available via grant dashboards and various financial reports.***
	Ability to provide cost allocation services, performance analysis and methodologies?	S	3	***The AmpliFund Fund module tracks all fund/program income and assets as well as award allocations and distributions. The system prevents award allocations over budget and allows real-time tracking and reporting of all awards created from the fund/program.*** ***AmpliFund has a number of built-in and configurable processes that support performance analysis. All awards can be configured with risk thresholds. Organization Administrators or Program Managers can***

				determine which factors indicate risk within a program and at what levels those factors trigger at an award to report as low, medium, or high risk. Risk statuses are shown on various dashboards within AmpliFund. ***The system also has processes for the sub-recipient to assist them in staying in compliance with various grant requirements. Spending thresholds and alerts and reporting reminders are two examples.*** ***In addition, the AmpliFund Reporting Engine has a library of reports that support performance analysis. Each report contains configurable input parameters and a highly interactive report viewer that enable users to filter results, interact with visualizations, drill-down into the underlying data, and export data to excel. For details regarding the configurable report templates within AmpliFund, please see Exhibit D.*** ***AmpliFund also allows for the creation and publication of custom reports. All organizational data is available within the AmpliFund data mart to be queried and visualized through the interactive report viewer. Impactful reports and dashboards can be created using data visualizations such as bar charts, column charts, line charts, pie charts, tables, matrices, gauges, and maps. Published reports can be made available globally within the organization or limited to specific user groups or roles. Details regarding the custom reporting capabilities within AmpliFund have been outlined in Exhibit E.***
6	**Grant Closeout**			
	Track and secure grant closures?	W	4	***The closeout process is streamlined within AmpliFund by enabling the simplified pulling of reports that analyze standard data needed to report back to the Federal Government. the State will also have full visibility into the administrative actions and requirements of an award that must be completed by the individual sub-recipients prior to closeout dates.***

				The State can also create and publish custom forms that the sub-recipient must submit prior to closeout. ***The State's unique closeout process can be mapped to a workflow within AmpliFund, enabling robust tracking capabilities and ensuring that grants go through the appropriate closure processes. Once closeout requirements have been fulfilled, the grant can be marked "closed."***
	Preserve associated documentation?	S	4	***AmpliFund has a built-in Document Manager that allows for unlimited upload and storage of project and grant documentation. Documents can be attached to the appropriate contacts, recipient organizations, projects, grants, and/or other individuals within AmpliFund. This functionality is available to both grantees and staff and allows the State and grantees to easily and securely share documents.*** ***Documents uploaded to the Document Manager are stored within AmpiFund for the life of the contract.***
	Archive grant file library for audit purposes?	S	4	***AmpliFund provides unlimited upload and storage of documents and records and does not require separate archiving processes. Many records types within the system support a status that removes them from the default views. This effectively archives the records without removing them from the system.*** ***Again, because AmpliFund serves as a central repository for all grant/contract data and documentation, the platform supports the State's fulfillment of audit requirements. AmpliFund also maintains a full activity log, tracking all actions taken within the system by different users. In addition, the workflow module contains a full audit log of activity that occurs throughout the life of the object within the workflow.*** ***AmpliFund supports the grantee audit process through the workflow engine, custom forms, and document upload. Custom forms can be created to track onsite monitoring (onsite monitoring checklists) and supporting documentation can be uploaded as necessary. The workflow can manage the entire process***

				including scheduling, onsite monitoring, and review.
7	**Professional Development** (after implementation)			
	References in solution to specific Uniform Grant Guidance?	S	4	***AmpliFund was intentionally designed to ensure that organizations remain in compliance with the ever-evolving Federal requirements surrounding grants management, including Federal Uniform Guidance.*** ***The Uniform Grant Guidance (UGG) effects the way that grantees of the Federal government are required to manage their federal funds and how those funds will be audited. The UGG does not mandate the creation of new policies and procedures. However, it does require that processes are standardized across the funded entity and that the entity, as part of an audit, demonstrates the standardization.*** ***Standardization affects many areas of business processes including time and effort, sub-recipient monitoring, internal management around the cost principles, matching, program income, and direct vs. indirect cost allocation. AmpliFund will allow the State to either activate new practices or map existing practices to standardize business processes in all the areas of the UGG. With configurable workflows built around each element of the UGG, AmpliFund can drive the standardization of processes within a program, a department, or across the entire State. These standardized practices can be tested and will ensure compliance with UGG. Furthermore, they will help enforce and/or create policies that, while not required, will improve the ability to do well on the single audit.***
	Professional grant consultant – <u>included</u> in cost?	N		***What level of access? Provide resume.*** ***The professional grant consultant that the AmpliFund team is proposing for this project is available at an additional hourly rate. Please see Exhibit F for the proposed grant consultant's resume.***

	Professional grant consultant – additional cost?	S	2	***What level of access? Provide resume.*** ***The professional grant consultant that the AmpliFund team is proposing for this project is available at an additional hourly rate. Please see Exhibit F for the proposed grant consultant's resume.***
	Training tools included: Webinars?	S	All	***After initial implementation, regularly scheduled virtual training sessions are available for all users. Training materials are also available at any time via the online AmpliFund Help Portal. Materials provided include process-specific help documentation, client-specific user guides, FAQs, short tutorial videos, and a ticket submission portal.***
	Training tools included: Web links?	S	All	***Web links to the AmpliFund Help Portal are included in the AmpliFund training program.***
	Training tools included: Articles?	S	All	***Articles and written, client-specific help documentation are available via the AmpliFund Help Portal and are included in the AmpliFund training program. Additionally, the AmpliFund team partners with Thompson Information Services to keep AmpliFund customers informed of the latest news, strategies, and resources in the grant management community via the Knowledge Center within the platform. Many AmpliFund clients have come to rely on this informational tool to stay ahead of the curve on the subject of grants management. AmpliFund users are able to find grant news, expert opinions, interactive guides, full publications, and recorded webinars that can all be used to increase efficiency in the grants process.***
	Training tools included: Technical books?	S	All	***Technical training book guides are included within the AmpliFund training program via the AmpliFund Help Portal.***
	Training tools included: Other?		All	***Describe:*** ***After initial implementation, all users will have access to the online AmpliFund Support Portal. Up-to-date training materials are available at any time via this portal and include process-specific help documentation, client-specific user guides, FAQs, and short tutorial videos. Users will also have access to***

				regularly scheduled virtual training sessions throughout the life of the contract. ***Furthermore, AmpliFund customers informed stay informed of the latest news, strategies, and resources in the grant management community via the AmpliFund Knowledge Center within the platform.***
8	**Future System Improvements**			
	Develop new upgrades/versions?	S	All	***How are they developed?*** ***AmpliFund maintains a thorough Product Roadmap. Whether entirely new pieces of functionality or additional feature enhancements to core functionality, the AmpliFund team is constantly evolving the platform based on customer feedback and trends in the industry. As the software is being updated, either in the weekly maintenance window or through a major release, release notes are published and training sessions are held as appropriate.*** ***Frequency developed?*** ***The AmpliFund team utilizes a weekly maintenance release cycle for patches and bug fixes and releases two major enhancements per year. The weekly AmpliFund maintenance window occurs every Wednesday night between 10pm and midnight EST. During this time, the platform may be upgraded with patches, new feature releases, etc. for all AmpliFund clients. The AmpliFund team makes every effort to limit service disruptions during the maintenance window. As a SaaS solution, all platform upgrades are made available to all AmpliFund clients with a subscription to those modules. Clients have the ability to utilize the product upgrades as they see fit.*** ***This model offers organizations a number of long term cost-savings opportunities. the State will receive all platform upgrades made to their AmpliFund modules throughout the life of the contract, at no additional cost. All maintenance, in addition to patches and bug***

				fixes, are covered within the annual subscription fee as well.
	Is there an additional charge for upgraded versions?	S	N/A	***No. As a SaaS solution, all platform maintenance and upgrades are made available to all AmpliFund clients with a subscription to those modules.***
9	**Other**			
	Describe capabilities NOT already captured:		N/A	***AmpliFund offers additional functionality outside the scope of the requirements outlined in this RFP. For instance, payment workflows within AmpliFund can be created, modified, and assigned as appropriate. While AmpliFund is not a payment processing system, the system will capture all pertinent financial and payment information. Request for payment records are generated within the platform based on grant activity after the grant has been awarded from the application. Grantees can request an advance and track against the advance or track expenses against the award and request reimbursement at specific intervals based on the parameters and configuration of the grant. AmpliFund also stores all cash receipt records and makes them available within the grant record.*** ***AmpliFund also supports the grantee audit/risk assessment process through the workflow engine, custom forms, and document upload. Custom forms can be created to track onsite monitoring (onsite monitoring checklists) and supporting documentation can be uploaded as necessary. The workflow can manage the entire process including scheduling, onsite monitoring, and review.*** ***The optional Time & Effort certification module supports the ability to track time spent by grant funded personnel.*** ***In addition, the AmpliFund team has an aggressive roadmap, and the product will grow alongside the State as their needs continue to evolve. Functionality such as custom fields and forms will allow total flexibility to reproduce and capture any field or form desired.***

4. Section VI - SCOPE OF WORK

The scope of work is broken down into tasks, activities and deliverables. The tasks and activities within this section are not necessarily listed in the order that they shall be completed. Vendors shall reflect within their proposal and preliminary project plan their recommended approach to scheduling and accomplishing all tasks and activities identified within this RFP.

All tasks performed by the awarded vendor may be reviewed by the Project Sponsor and Project Manager.

4.1 VENDOR RESPONSE TO SCOPE OF WORK

4.1.1 Within the proposal, vendors shall provide information regarding their approach to meeting the requirements described within ***Sections 4.4 through 4.9***.

4.1.2 If subcontractors shall be used for any of the tasks, vendors shall indicate what tasks and the percentage of time subcontractor(s) shall spend on those tasks.

4.1.3 Vendor's response shall be limited to no more than five (5) pages per task not including appendices, samples and/or exhibits.

Per Amendment 1, information regarding the AmpliFund team's approach to the requirements described within Sections 4.2-4.9 has been included in the sections below. The AmpliFund team utilizes an established, flexible project approach, which has proven to be effective when implementing AmpliFund for hundreds of clients over the years. Throughout the following sections, the AmpliFund Implementation Methodology has been seamlessly mapped to the State's requirements. For a full description of the AmpliFund Implementation Methodology please see Exhibit G.

No subcontractors will be used for any of the tasks outlined within Sections 4.2-4.9.

4.2 DELIVERABLE SUBMISSION AND REVIEW PROCESS

Once the detailed project plan is approved by the State, the following sections detail the process for submission and review of deliverables during the life of the project/contract.

4.2.1 General

4.2.1.1 The contractor shall provide one (1) master (both hard and soft copies) and four (4) additional hard copies of each written deliverable to the appropriate State Project Manager as identified in the contract.

4.2.1.2 Once a deliverable is approved and accepted by the State, the contractor shall provide an electronic copy. The State may, at its discretion, waive this requirement for a particular deliverable.

4.2.1.3 The electronic copy shall be provided in software currently utilized by the agency or provided by the contractor.

4.2.1.4 Deliverables shall be evaluated by the State utilizing mutually agreed to acceptance/exit criteria.

The AmpliFund team has reviewed and will comply fully with the requirements outlined above.

The AmpliFund Implementation Team conducts a client kickoff meeting to introduce the project teams, review project scope, establish key dates in the project timeline, set expectations, assign initial tasks, and answer any initial questions. As part of the project scope review, deliverable submission processes are finalized, including format of delivery and client evalutation and approval processes. The sub requirements outlined within Section 4.2.1 can be fully accommodated, and are not outside the scope of the Amplifund team's normal processes.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.2.2 Deliverable Submission

4.2.2.1 Prior to development and submission of each contract deliverable, a summary document containing a description of the format and content of each deliverable shall be delivered to the State Project Manager for review and approval. The summary document shall contain, at a minimum, the following:

A. Cover letter;

B. Table of Contents with a brief description of the content of each section;

C. Anticipated number of pages; and

D. Identification of appendices/exhibits.

4.2.2.2 The summary document shall contain an approval/rejection section that can be completed by the State. The summary document shall be returned to the contractor within a mutually agreed upon time frame.

4.2.2.3 Deliverables shall be developed by the contractor according to the approved format and content of the summary document for each specific deliverable.

4.2.2.4 At a mutually agreed to meeting, on or before the time of delivery to the State, the contractor shall provide a walkthrough of each deliverable.

4.2.2.5 Deliverables shall be submitted no later than 5:00 PM, per the approved contract deliverable schedule and shall be accompanied by a deliverable sign-off form ***(refer to Attachment F)*** with the appropriate sections completed by the contractor.

The AmpliFund team has reviewed and will comply fully with the requirements outlined above.

Preliminary deliverable descriptions will be submitted to the State Project Manager in the format and timeline outlined above. Upon approval and subsequent creation of the deliverable, a deliverable review meeting will be conducted to walk through the document and discuss any questions or items of particular importance. After resolving any issues and providing adequate clarification, the AmpliFund team will submit the final deliverable to the State Project Manager per the mutually agreed upon deliverable schedule, along with the required sign-off form.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.2.3 Deliverable Review

4.2.3.1 General

A. The State's review time begins on the next working day following receipt of the deliverable.

B. The State's review time shall be determined by the approved and accepted detailed project plan and the approved contract.

C. The State has up to five (5) working days to determine if a deliverable is complete and ready for review. Unless otherwise negotiated, this is part of the State's review time.

D. Any subsequent deliverable dependent upon the State's acceptance of a prior deliverable shall not be accepted for review until all issues related to the previous deliverable have been resolved.

E. Deliverables determined to be incomplete and/or unacceptable for review shall be rejected, not considered delivered and returned to the contractor.

F. After review of a deliverable, the State shall return to the contractor the project deliverable sign-off form with the deliverable submission and review history section completed.

4.2.3.2 Accepted

A. If the deliverable is accepted, the original deliverable sign-off form signed by the appropriate State representatives shall be returned to the contractor.

B. Once the contractor receives the original deliverable sign-off form, the State can then be invoiced for the deliverable ***(refer to Section 7, Financial).***

4.2.3.3 Comments/Revisions Requested by the State

If the State has comments and/or revisions to a deliverable, the following shall be provided to the contractor:

A. The original deliverable sign-off form with an updated entry to the deliverable submission and review history section.

B. Attached to the deliverable sign-off form shall be a detailed explanation of the revisions to be made and/or a marked up copy of the deliverable.

C. The State's first review and return with comments shall be completed within the times specified in the contract.

D. The contractor shall have five (5) working days, unless otherwise mutually agreed to, for review, acceptance and/or rejection of the State's comments.

E. A meeting to resolve outstanding issues shall be completed within three (3) working days after completion of the contractor's review or a mutually agreed upon time frame.

F. Agreements made during meetings to resolve issues shall be documented separately.

G. Once an agreement is reached regarding changes, the contractor shall incorporate them into the deliverable for resubmission to the State.

H. All changes shall be easily identifiable by the State.

I. Resubmission of the deliverable shall occur within five (5) working days or a mutually agreed upon time frame of the resolution of any outstanding issues.

J. The resubmitted deliverable shall be accompanied by the original deliverable sign-off form.

K. This review process continues until all issues have been resolved within a mutually agreed upon time frame.

L. During the re-review process, the State may only comment on the original exceptions noted.

M. All other items not originally commented on are considered to be accepted by the State.

N. Once all revisions have been accepted, the original deliverable sign-off form signed by the appropriate State representatives shall be returned to the contractor.

O. The contractor shall provide one (1) updated and complete master paper copy of each deliverable after approval and acceptance by the State.

P. Once the contractor receives the original deliverable sign-off form, the State can then be invoiced for the deliverable ***(refer to Section 7, Financial)***.

4.2.3.4 Rejected, Not Considered Delivered

If the State considers a deliverable not ready for review, the following shall be returned to the contractor:

A. The original deliverable sign-off form with an updated entry to the deliverable submission and review history section.

B. The original deliverable and all copies with a written explanation as to why the deliverable is being rejected, not considered delivered.

C. The contractor shall have five (5) working days, unless otherwise mutually agreed to, for review, acceptance and/or rejection of the State's comments.

D. A meeting to discuss the State's position regarding the rejection of the deliverable shall be completed within three (3) working days after completion of the contractor's review or a mutually agreed upon time frame.

E. Resubmission of the deliverable shall occur within a mutually agreed upon time frame.

F. The resubmitted deliverable shall be accompanied by the original deliverable sign-off form.

G. Upon resubmission of the completed deliverable, the State shall follow the steps outlined in ***Section 4.2.3.2, Accepted,*** or ***Section 4.2.3.3, Comments/Revisions Requested by the State***.

The AmpliFund team has reviewed and will comply fully with the requirements outlined above.

Should there be any issues with a submitted deliverable, the appropriate changes will be made and submitted back to the State for review (along with an updated sign-off form). Subsequent dependent deliverables will not be submitted for review until the State has accepted the prior deliverable. A meeting to resolve any issues will be conducted as appropriate. Once the deliverable has been accepted, and the State has returned the completed deliverable sign-off form, subsequent dependent deliverables will be submitted for review as appropriate.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.3 PROJECT KICK OFF MEETING

A project kick off meeting shall be held with representatives from the State and the contractor after contract approval and prior to work performed. Items to be covered in the kick off meeting shall include, but not be limited to:

4.3.1 Deliverable review process;

4.3.2 Determining format and protocol for project status meetings;

4.3.3 Determining format for project status reports;

4.3.4 Setting the schedule for meetings between representatives from the State and the contractor to develop the detailed project plan;

4.3.5 Defining lines of communication and reporting relationships;

4.3.6 Reviewing the project mission;

4.3.7 Pinpointing high-risk or problem areas; and

4.3.8 Issue resolution process.

The AmpliFund Implementation Methodology includes seven phases: Initiation, Planning, Analysis, Configuration, Testing, Migration, and Go-Live. A project kickoff will take place at the beginning of the Initiation phase, prior to any work starting. Along with covering requirements 4.3.1 - 4.3.8, the meeting will be scheduled to review project scope, establish key dates in the project timeline, set expectations, assign initial tasks, and answer any initial questions. A sample Project Status Report has been included as Exhibit H, and will be reviewed and tailored to meet the State's requirements.

The project kickoff meeting is an important step toward developing a relationship with the State. Time is typically set aside during this meeting for general discussions and product demonstrations to ensure that all of the project stakeholders understand the key objectives of the project and AmpliFund's high level capabilities. A successful project kickoff meeting leads to effective communication and a successful project delivery. The findings from the Project Kickoff Meeting will be documented in the Project Management Plan and will be shared with project stakeholders.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan (Exhibit H), provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.4 PLANNING AND ADMINISTRATION

4.4.1 Objective

The objective of this task is to ensure that adequate planning and project management are dedicated to this project.

4.4.2 Activities

The awarded vendor shall:

4.4.2.1 Work with the State to provide a detailed project plan with fixed deadlines to include, but not be limited to:

A. Project schedule including tasks, activities, activity duration, sequencing and dependencies;

B. Project work plan for each deliverable, including a work breakdown structure;

C. Completion date of each task;

D. Project milestones;

E. Entrance and exit criteria for specific project milestones; and

F. Project organization including a resource plan defining roles and responsibilities for the awarded vendor, subcontractors (if applicable) and State.

4.4.2.2 Attend and participate in all project related meetings requested by the State at a location to be determined by the State. Attendance may be in person or via teleconferencing, as mutually agreed to by the project team. These meetings shall follow an agenda mutually developed by the awarded vendor and the State. The awarded vendor shall prepare materials or briefings for these meetings as requested by the State. Minutes shall be taken and distributed by State staff within five (5) working days after the meeting. Minutes may be distributed via facsimile or email.

The agenda may include, but not be limited to:

A. Review and approval of previous meeting minutes;
B. Contractor project status;
C. State project status;
D. Contract status and issues, including resolutions;
E. Quality Assurance status;
F. New action items;
G. Outstanding action items, including resolutions;
H. Setting of next meeting date; and
I. Other business.

4.4.2.3 Provide written semi-monthly project status reports delivered to State project management by the third (3rd) working day following the end of each reporting period. The format shall be approved by the State prior to issuance of the first semi-monthly project status report. The first semi-monthly report covers the reporting period from the 1st through the 15th of each month; and the second semi-monthly report covers the reporting period from the 16th through the end of the month. The status reports shall include, but not be limited to the following:

A. Overall completion status of the project in terms of the State approved project work plan and deliverable schedule;

B. Accomplishments during the period, including State staff/stakeholders interviewed, meetings held, Joint Application Development (JAD) sessions and conclusions/decisions determined;

C. Problems encountered and proposed/actual resolutions;

D. What is to be accomplished during the next reporting period;

E. Issues that need to be addressed, including contractual;

F. Quality Assurance status;

G. Updated MS Project time line showing percentage completed, tasks assigned, completed and remaining;

H. Identification of schedule slippage and strategy for resolution;

I. Contractor staff assigned and their location/schedule;

J. State resources required for activities during the next time period; and

K. Resource allocation percentages including planned versus actual by project milestone.

4.4.2.4 Develop a comprehensive approach for handling communications with both internal and external audiences. Effective communication is critical to the development of productive relationships with concerned stakeholders. The communication plan shall include, but not be limited to: a plan for generation, documentation, storage, transmission and disposal of all project information.

4.4.2.5 Develop a risk management plan to ensure that risks are identified, planned for, analyzed, communicated and acted upon effectively.

4.4.2.6 Develop a quality assurance plan including, but not limited to, the methodology for maintaining quality of the code, workmanship, project schedules and subcontractor(s) activities.

4.4.2.7 Develop a Knowledge Transfer Plan, present the plan to the State, execute the plan and obtain State acceptance before and after the plan is executed. The plan shall include sufficient time and resources to accomplish a full transfer of knowledge to assure that the State can operate the system independently and obtain timely and effective support from the vendor.

4.4.2.8 The State shall perform a Post Implementation Evaluation Review (PIER) approximately six (6) months after full implementation and State acceptance of all deliverables. The awarded vendor's Project Manager shall be required to participate on site for a period of not to exceed three (3) days.

4.4.3 Deliverables

4.4 PLANNING AND ADMINISTRATION DELIVERABLES			
DELIVERABLE NUMBER	DESCRIPTION OF DELIVERABLE	ACTIVITY	STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)
4.4.3.1	Detailed Project Plan	4.4.2.1	15
4.4.3.2	Attendance at all scheduled meetings	4.4.2.2	N/A
4.4.3.3	Written Semi-Monthly Project Status Report	4.4.2.3	5
4.4.3.4	Communication Plan	4.4.2.4	10
4.4.3.5	Risk Management Plan	4.4.2.5	10
4.4.3.6	Quality Assurance Plan	4.4.2.6	10
4.4.3.7	Knowledge Transfer Plan	4.4.2.8	10
4.4.3.8	Post Implementation Evaluation Review	4.4.2.9	5

The AmpliFund team has reviewed and will comply fully with the requirements and the provision of the deliverables outlined above.

Phase 2 (Planning) of the AmpliFund Implementation Methodology includes many standard processes that map to the requirements outlined by the State in this section. The AmpliFund Implementation Team works closely with the client to clarify all aspects of the project. Once the scope is clearly defined, key milestone dates are established and serve as the basis of the project schedule. Following review and approval of the key milestones, a project plan is built. The project's status meeting cadence is set based on implementation complexity. The following key activites will be tailored to meet the State's specific needs:

- ***Develop project management plan***
- ***Finalize project staffing***

- ***Identify project stakeholders (both internal and external)***
- ***Initiate business requirements and grants management processes reviews***
- ***Develop communication plan***

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.5 CHANGE MANAGEMENT PLAN

4.5.1 Objective

4.5.1.1 Develop a Change Management Plan and Control Procedures and present it to the State for acceptance. This plan shall be used by the vendor and the State in the design, specification, construction, implementation and support of the system.

4.5.2 Activities

The awarded vendor shall:

4.5.2.1 Vendor shall conduct interviewing;

- Plan and facilitate sessions to document current processes, internal controls, systems used, and primary challenges.

4.5.2.2 The vendor shall map processes.

- The vendor shall document findings.

4.5.2.3 The vendor shall map capabilities.

- Compare and contrast to compatible functionality.

4.5.2.4 The vendor shall implement the change management plan

- Complete optimization.

4.5.2.5 The vendor shall evaluate and complete any corrective actions necessary.

- Evaluate results and tasks associated, confirm desired outcome was achieved

4.5.3 Deliverables

4.5 Change Management Plan			
DELIVERABLE NUMBER	DESCRIPTION OF DELIVERABLE	ACTIVITY	STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)
4.5.3.1	Appropriate information gathered for next step to begin.	4.5.2.1	60
4.5.3.2	Processes shall be documented.	4.5.2.2	30
4.5.3.3	Optimization of capabilities.	4.5.2.3	30
4.5.3.4	State shall determine if increased funding is needed.	4.5.2.4	10
4.5.3.5	Adoptions of any necessary revisions and acceptance	4.5.2.5	10

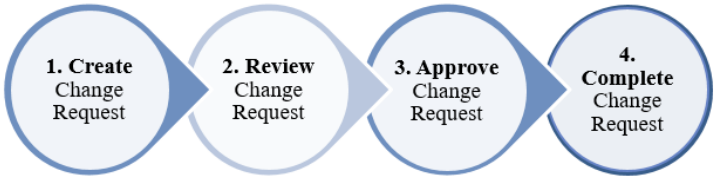
The AmpliFund team has reviewed and will comply fully with the requirements and provision of the deliverables outlined above.

This particular section aligns to the Analysis Phase in the AmpliFund Implementation Methodology where requirements are gathered, processes are documented, and the related deliverables are submitted for approval by the State.

As the project moves through the appropriate phases, it is very common for there to be changes made to the overall design of the solution. In order to ensure that all parties are aware and understand any associated impacts to the proposed change, a change control process will be initiated.

The objective of the AmpliFund Change Control Plan (CCP) is to create a process that can be used during each stage of the implementation process for scope management. The CCP is intended to outline each of the steps,as well as the individuals and tools involved in the management of changes. A modification to a previously agreed upon element of the project is considered a change. In most cases, a change relates to scope or functionality within AmpliFund. Regardless of where it originates from, each change will be evaluated to measure the impact to the project scope, schedule, and budget.

The AmpliFund CMP is based on four basic steps:



The AmpliFund Project Manager is responsible for overseeing the execution of the CMP. A sample Change Request (CR) form has been included as Exhibit K, and is leveraged throughout the project to facilitate the CMP. Deliverables from the RFP have been inserted to show where they are executed within the CMP.

4.6 PRE-GRANT AWARD SETUP

4.6.1 Objective

4.6.1.1 Vendor shall complete all tasks necessary to identify users and roles, create accounts, conduct training and implement system.

4.6.2 Activities

The awarded vendor shall:

4.6.2.1 Vendor shall identify internal users and roles.

- Vendor shall make a list of users and roles.

4.6.2.2 Vendor shall create user accounts.

- Individual user account creation shall be completed.

4.6.2.3 The vendor shall conduct pre-award training.

- Conduct initial training of all users to include departments, agencies and individuals.

4.6.2.4 The vendor shall complete the implementation for the pre-award setup.

- Complete optimization.

4.6.2.5 The vendor shall evaluate and complete any corrective actions necessary.

- Evaluate results and tasks associated, confirm desired outcome was achieved.

4.6.3 Deliverables

4.6 Pre-Grant Award Setup			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
4.6.3.1	All users identified and documented	4.6.2.1	30
4.6.3.2	Complete Profiles	4.6.2.2	30
4.6.3.3	Increase funding if necessary	4.6.2.3	10
4.6.3.4	All users master the process	4.6.2.4	30
4.6.3.5	Adoptions of any necessary revisions and acceptance	4.6.2.5	10

The AmpliFund team has reviewed and will comply fully with the deliverables and requirements outlined above. The standard 7 AmpliFund Implementation

Methodology phases (Initiation, Planning, Analysis, Configuration, Testing, Migration, and Go-Live) will be carried out in order to successfully implement pre-grant award functionality. Details regarding these phases have been included within Exhibit G.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit H, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.7 POST-GRANT AWARD SETUP

4.7.1 Objective

4.7.1.1 Vendor shall complete a list of open grant awards, migrate data, track spending and continue training.

4.7.2 Activities

The awarded vendor shall:

4.7.2.1 Vendor shall compile data for open awards.

- Vendor shall complete a list of open grant awards across agencies statewide.

4.7.2.2 Vendor shall migrate all data.

- Vendor shall migrate all grant data.

4.7.2.3 The vendor shall complete all compliance tasks.

- Project management;
- Maintenance; and
- Track Spending.

4.7.2.4 The vendor shall conduct post-award training

- Initial training of department, agency, personnel, etc.

4.7.2.5 The vendor shall complete the implementation for the post-award setup.

- Complete optimization.

4.7.2.6 The vendor shall evaluate results and complete any corrective action.

- Evaluate results and tasks associated, confirm desired outcome was achieved

4.7.3 Deliverables

4.7 Post-Grant Award Setup			
DELIVERABLE NUMBER	DESCRIPTION OF DELIVERABLE	ACTIVITY	STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)
4.7.3.1	Complete inventory of grant awards	4.7.2.1	60
4.7.3.2	Management of existing awards	4.7.2.2	30
4.7.3.3	Scheduled reporting requirements for internal metrics and goals	4.7.2.3	30
4.7.3.4	Enhanced administration and reduced audit findings	4.7.2.4	30
4.7.3.5	All users master the process	4.7.2.5	60
4.7.3.6	Adoptions of any necessary revisions and acceptance	4.7.2.6	10

The AmpliFund team has reviewed and will comply fully with the deliverables and requirements outlined above. The standard 7 AmpliFund Implementation Methodology phases (Initiation, Planning, Analysis, Configuration, Testing, Migration, and Go-Live) will be carried out in order to successfully implement post-grant award functionality. Details regarding these phases have been included within Exhibit G.

Specific to this section is data migration, which will take place during Phase 3 (Requirements Design) and Phase 4 (Software Configuration). In conjunction with the State, the AmpliFund team will develop a comprehensive plan to accurately and efficiently migrate data in a way that meets the State's business requirements and needs. Requirement workshops will take place in order to complete legacy data mapping tasks, and the State will prepare all necessary load files. The AmpliFund team and the State will work together to prepare and validate legacy data mapping documentation. Legacy data migration test scripts and scenarios will be developed prior to legacy data migration testing being carried out.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.8 SUB-RECIPIENT SETUP

4.8.1 Objective

4.8.1.1 Vendor shall streamline forms, list programs available and compile sub-recipients and complete profiles for the portal.

4.8.2 Activities

The awarded vendor shall:

4.8.2.1 Vendor shall standardize the application.

- Streamline a variety of forms for efficiency and consolidation.

4.8.2.2 Vendor shall conduct a solicitation of profiles.

- Vendor shall make a list of programs available.

4.8.2.3 The vendor shall complete sub-recipient portal setup.

- Vendor shall compile a list of sub-recipients and complete the profiles for the portal.

4.8.2.4 The vendor shall conduct sub-recipient training.

- Initial training of department, agency, personnel, etc.

4.8.2.5 The vendor shall complete the implementation for the sub-recipient setup.

- Complete optimization.

4.8.2.6 The vendor shall evaluate results and complete any corrective action.

- Evaluate results and tasks associated, confirm desired outcome was achieved

4.8.3 Deliverables

4.8 Sub-recipient Setup			
DELIVERABLE NUMBER	**DESCRIPTION OF DELIVERABLE**	**ACTIVITY**	**STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)**
4.8.3.1	Reduction and simplicity of document library.	4.8.2.1	30
4.8.3.2	Solicitation library complete	4.8.2.2	30
4.8.3.3	Sub-recipient access to portal	4.8.2.3	30
4.8.3.4	Enhanced administration and reduced audit findings	4.8.2.4	60

4.8 Sub-recipient Setup			
4.8.3.5	All users master the process	4.8.2.5	60
4.8.3.6	Adoptions of any necessary revisions and acceptance	4.8.2.6	10

The AmpliFund team has reviewed and will comply fully with the deliverables and requirements outlined above. The standard 7 AmpliFund Implementation Methodology phases (Initiation, Planning, Analysis, Configuration, Testing, Migration, and Go-Live) will be carried out in order to successfully set up sub-recipients in the system. Details regarding these phases have been included within Exhibit G.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

4.9 ON-GOING TECHNICAL SUPPORT

4.9.1 Objective

4.9.1.1 Vendor shall provide on-going technical support of all grant management system activities.

4.9.2 Activities

The awarded vendor shall:

4.9.2.1 Vendor shall provide access to professional consultant.

- Vendor shall provide on-going access to best practice and industry standards.

4.9.2.2 Vendor shall provide technical assistance as needed.

- Vendor shall address all questions or concerns regarding "how-to" of program/portal.

4.9.2.3 The vendor shall address all maintenance issues and concerns.

- Portal shall be a functioning grant management system for 24hour, 7 day a week access by all users.

4.9.2.4 The vendor shall provide version upgrades.

- The State will have access to revisions and upgrades to the grant management system. Vendor cannot perform upgrades

during normal business hours, 8am-5pm, Monday-Friday. Vendor will provide a 15-day notice when upgrades are scheduled.

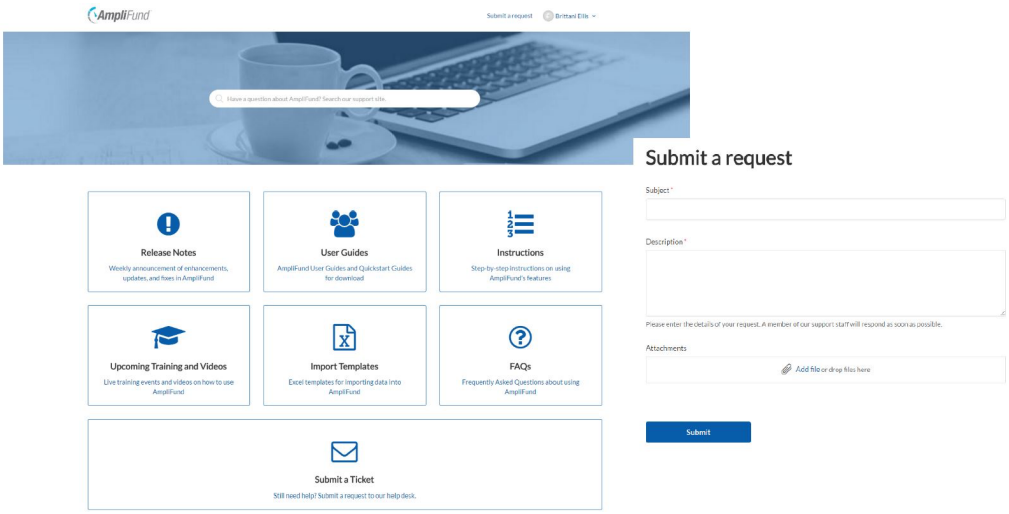
4.9.3 Deliverables

4.9 On-going Technical Support			
DELIVERABLE NUMBER	DESCRIPTION OF DELIVERABLE	ACTIVITY	STATE'S ESTIMATED REVIEW TIME (WORKING DAYS)
4.9.3.1	On-going access to best practice and industry standards	4.9.2.1	Duration
4.9.3.2	All questions and concerns answered	4.9.2.2	Duration
4.9.3.3	Grant Management System allows access to all users 24 hour, 7 days a week	4.9.2.3	Duration
4.9.3.4	Revisions and upgrades accessed	4.9.2.4	10

The AmpliFund team will provide on-going technical support of all grant management system activities. In addition to providing access to an expert grant consultant, whose resume has been included as Exhibit F, the State will also have access to the Knowledge Center. Many AmpliFund clients have come to rely on this informational tool to stay ahead of the curve on the subject of grants management. AmpliFund users are able to find grant news, expert opinions, interactive guides, full publications, and recorded webinars that can all be used to increase efficiency in the grants process.

An AmpliFund subscription includes full access to the AmpliFund standard help desk for support requests. This includes Tier I Technical Support, which is available online 24 hours a day, 7 days a week, for bug reporting, feature requests, and customer support tickets. Tier II Technical Support is also available, which involves live communication with support agents. Tier II Support is available from 8:00am – 8:00pm EDT, Monday through Friday. Phone calls will be answered or returned in the same business day (usually within one hour of receipt). In the event that an issue cannot be resolved immediately with Tier II Support, a defect report is filed. If a workaround is not available, defect resolution is escalated to the highest level.

All users will also have access to the online AmpliFund Support Portal. Up-to-date training materials are available at any time via this portal and include process-specific help documentation, client-specific user guides, FAQs, and short tutorial videos. Users will also have access to regularly scheduled virtual training sessions throughout the life of the contract.



As a SaaS solution, AmpliFund is available 24 hours a day, 7 days a week via any device with internet connection and a standard supported web browser. StreamLink Software utilizes a weekly maintenance release cycle for patches and bug fixes and releases two major enhancements per year. The StreamLink Software Development Team utilizes continuous integration. The StreamLink Software QA team tests and verifies all patches and new functionality and performs regular regression testing.

StreamLink Software maintains a dedicated QA team responsible for all product testing. The group oversees automated unit tests and performs manual feature testing for all new and revised functionality. The product team performs final end-to-end user testing and sign-off prior to all product releases. StreamLink Software has also utilized user groups consisting of clients, internal staff, and product designers to provide input into product specifications and design, as well as to review the completed product.

The weekly AmpliFund maintenance window occurs every Wednesday night between 10pm and midnight EST. During this time, the platform may be upgraded with patches, new feature releases, etc. for all AmpliFund clients. StreamLink Software makes every effort to limit service disruptions during the maintenance window. As a SaaS solution, all platform upgrades are made available to all AmpliFund clients with a subscription to those modules. Clients have the ability to utilize the product upgrades as they see fit.

This model offers organizations a number of long term cost-savings opportunities. The State will receive all platform upgrades made to their AmpliFund modules throughout the life of the contract, at no additional cost. All maintenance, in addition to patches and bug fixes, are covered within the annual subscription fee as well.

As referenced in Section 4.1, details regarding the comprehensive AmpliFund Implementation Methodology included within Exhibit G, combined with the preliminary project plan, provide a full picture of the

implementation approach for this project. It is important to note that, as a SaaS solution, the implementation of AmpliFund differs from that of a traditional software implementation. The AmpliFund team's commitment to the State is to ensure the processes and deliverables outlined in this Scope of Work will be fully addressed via the AmpliFund Implementation Methodology.

5. Section VII - COMPANY BACKGROUND AND REFERENCES

5.1 VENDOR INFORMATION

5.1.1 Vendors shall provide a company profile in the table format below.

Question	Response
Company name:	***StreamLink Software***
Ownership (sole proprietor, partnership, etc.):	***Private corporation***
State of incorporation:	***Delaware***
Date of incorporation:	***2008***
# of years in business:	***9 years***
List of top officers:	***Adam Roth (CEO), John Dearborn (President), Scott Weiss (CTO), Steve Kosko (CRO), Fred Binstock (CFO)***
Location of company headquarters, including City and State:	***Cleveland, Ohio***
Location(s) of the office that shall provide the services described in this RFP:	***Cleveland, Ohio (company headquarters)***
Number of employees locally with the expertise to support the requirements identified in this RFP:	***All 41 StreamLink Software employees are based in Cleveland, Ohio and dedicated solely to AmpliFund. Select project team members will travel to Nevada to deliver implementation services as mutually agreed upon and preliminarily outlined throughout this proposal.***
Number of employees nationally with the expertise to support the requirements in this RFP:	***41***
Location(s) from which employees shall be assigned for this project:	***Cleveland, Ohio***

5.1.2 A Nevada-based business may apply for a five percent (5%) preference on its proposal. This preference may apply if a business has its principal place of business within Nevada. This preference cannot be combined with any other preference, granted for the award of a contract using federal funds, or granted for the award of a contract procured on a multi-state basis. To claim this preference a business must submit a letter with its proposal showing that it qualifies for the preference.

StreamLink Software is not a Nevada-based business and will not be applying for a preference.

5.1.3 **Please be advised**, pursuant to NRS 80.010, a corporation organized pursuant to the laws of another state shall register with the State of Nevada, Secretary of State's Office as a foreign corporation before a contract can be executed between the State of Nevada and the awarded vendor, unless specifically exempted by NRS 80.015.

StreamLink Software will comply with this requirement upon the award of the business.

5.1.4 The selected vendor, prior to doing business in the State of Nevada, shall be appropriately licensed by the State of Nevada, Secretary of State's Office pursuant to NRS76. Information regarding the Nevada Business License can be located at http://nvsos.gov.

Question	Response
Nevada Business License Number:	***Obtained after vendor selection***
Legal Entity Name:	***StreamLink Software, Inc.***

Is "Legal Entity Name" the same name as vendor is doing business as?

Yes	*x*	No	

If "No", provide explanation.

5.1.5 Vendors are cautioned that some services may contain licensing requirement(s). Vendors shall be proactive in verification of these requirements prior to proposal submittal. Proposals that do not contain the requisite licensure may be deemed non-responsive.

Pre-proposal licensing requirements are not applicable to this opportunity.

5.1.6 Has the vendor ever been engaged under contract by any State of Nevada agency?

Yes	*x*	No	

If "Yes", complete the following table for each State agency for whom the work was performed. Table can be duplicated for each contract being identified.

Question	Response
Name of State agency:	***Nevada Department of Health and Human Services***
State agency contact name:	***Cindy Smith***
Dates when services were performed:	***July 2016- Present***
Type of duties performed:	***AmpliFund implementation, maintenance and support***
Total dollar value of the contract:	***$21,780***

5.1.7 Are you now or have you been within the last two (2) years an employee of the State of Nevada, or any of its agencies, departments, or divisions?

Yes		No	***x***

If "Yes", please explain when the employee is planning to render services, while on annual leave, compensatory time, or on their own time?

If you employ (a) any person who is a current employee of an agency of the State of Nevada, or (b) any person who has been an employee of an agency of the State of Nevada within the past two (2) years, and if such person shall be performing or producing the services which you shall be contracted to provide under this contract, you shall disclose the identity of each such person in your response to this RFP, and specify the services that each person shall be expected to perform.

5.1.8 Disclosure of any significant prior or ongoing contract failures, contract breaches, civil or criminal litigation in which the vendor has been alleged to be liable or held liable in a matter involving a contract with the State of Nevada or any other governmental entity. Any pending claim or litigation occurring within the past six (6) years which may adversely affect the vendor's ability to perform or fulfill its obligations if a contract is awarded as a result of this RFP shall also be disclosed.

Does any of the above apply to your company?

Yes		No	***x***

If "Yes", please provide the following information. Table can be duplicated for each issue being identified.

Question	**Response**	
Date of alleged contract failure or breach:		
Parties involved:		
Description of the contract failure, contract breach, litigation, or investigation, including the products or services involved:		
Amount in controversy:		
Resolution or current status of the dispute:		
If the matter has resulted in a court case:	Court	Case Number
Status of the litigation:		

5.1.9 Vendors shall review and provide if awarded a contract the insurance requirements as specified in ***Attachment D, Insurance Schedule for RFP 3474.***

StreamLink Software agrees to comply with this requirement.

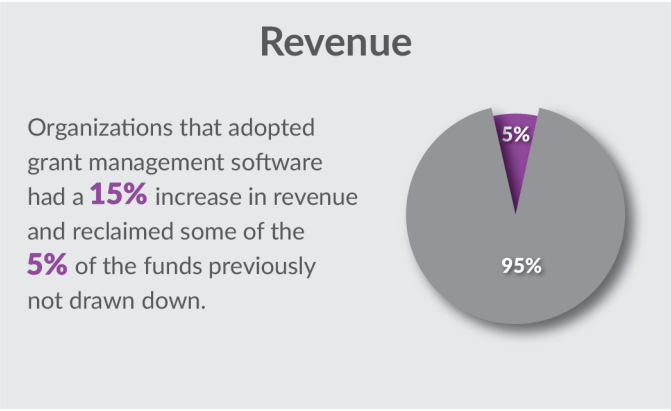
5.1.10 Company background/history and why vendor is qualified to provide the services described in this RFP. Limit response to no more than five (5) pages.

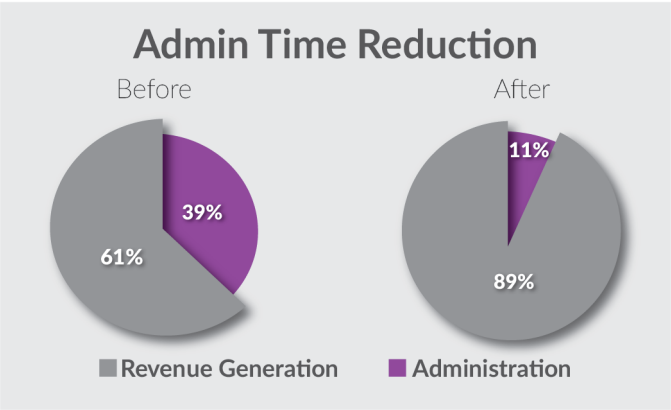
StreamLink Software Founder and CEO, Adam Roth, struggled with the management of his grants as an Executive Director of a large nonprofit organization. The lack of a comprehensive, cost-effective solution that allowed an organization to manage all grant functions was the catalyst to Adam's creation of StreamLink Software and the Grants Management solution, AmpliFund.

Released in 2011, AmpliFund is an end-to-end, COTS grant management solution that was built from the ground up, primarily serving nonprofit clients in the early days. As the solution continued to develop over the years, hundreds of nonprofits, higher education organizations, cities, counties, state agencies, and private sector agencies have chosen AmpliFund to meet their grant management needs. For a sampling of AmpliFund's government clients, please see Exhibit I.

While AmpliFund has many clients across many different industries, it should be noted that one current client is HHS within the State of Nevada. The AmpliFund team has been working with the Agency for 1 year, and while the scope of this RFP is larger, the functionality that is being utilized and the method by which it was deployed is very similar to the proposed plan for this RFP. The AmpliFund team has built a strong relationship with the HHS team, and we are very pleased that they agreed to be a reference for this RFP response. Their willingness to serve as a reference is a great indication that they believe AmpliFund is providing value, and we hope that the State sees this as a true indication that AmpliFund is the right solution for the State as whole.

The goal of any software application is to standardize and simplify business processes to gain efficiencies that lead to an effective ROI. AmpliFund clients have found an increase in both revenue and draw down, and a decrease in time spent on administrative tasks. For example, by leveraging the AmpliFund workflow engine, one of our clients was able to reduce their internal process completion time from 10 business days down to 3.





Again, AmpliFund is a fully functioning, already built system, meaning that these results were achieved without the need for any costly or time-consuming customizations. Not only does this model provide cost and labor efficiencies, but it also eliminates the inherent risks involved with building a completely customized solution or customizing an existing platform (such as a CRM). With highly customized solutions, there is no guarantee that the desired results will be achieved. AmpliFund has already demonstrated its ability to provide a significant ROI time and time again.

Key Differentiators	AmpliFund Public Sector	CRM Solution	Custom-Built Solution
Fastest Speed to Market	✓	✗	✗
Lowest Implementation Risk	✓	✗	✗
Lowest Total Cost of Ownership	✓	✗	✗
Earliest Return on Investment	✓	✗	✗

When a system needs to be developed/built, there is an increased level of risk. As a result, an increased focus on methodology and financial consequences to safeguard against those inherent risks are necessary. These risks are not applicable to AmpliFund. The platform is a fully functional, commercial-off-the-shelf (COTS) offering that is configured, not developed, to meet the unique needs of each AmpliFund client. Configuration is done through the user interface and does not require any level of programming. This minimizes the amount of time, effort, and risk to implement as compared to platform based solutions that require development. This ultimately leads to the following benefits for the State:

- ***<u>Fastest speed to market:</u> Because AmpliFund is fully developed and has been implemented for hundreds of clients across the world, the system can be deployed in a matter of weeks or months. This is a significant improvement in the time it takes to customize an existing platform or develop a custom solution. When development is required, the system can take multiple quarters, or years, to be up and running.***

- ***<u>Lowest implementation risk:</u> Again, AmpliFund is fully developed and can be easily configured in order to meet clients' unique organizational needs. Configuration can be performed by the State's administrative end users through the user interface and does not require any programming or technical knowledge. This means that, as organizations' processes and needs evolve over time, the platform can accommodate those changes quickly, seamlessly, and at no additional cost. The AmpliFund team works closely with clients during implementation in order to create the initial configuration of the platform and will support any desired configuration changes throughout the life of the contract at no additional cost. Custom-built platforms and CRM-based solutions require vendor intervention to support evolving business needs such as updated workflows, budgets, and/or reports. This results in additional fees, time-consuming work, and disruption to users' work days.***
- ***<u>Lowest total cost of ownership:</u> The annual AmpliFund license fee is all-inclusive, and clients never receive hidden fees for services related to the platform. Clients own their system with support from the AmpliFund team as needed. The extensive support offered to all AmpliFund users (both internal and external) is outlined in detail within Exhibit J. Furthermore, upgrades, enhancements, hosting, backups, and ongoing compliance with evolving Federal regulations and guidelines are all provided at no additional cost. Internal IT staff are not needed to support AmpliFund.***
- ***<u>Earliest return on investment (ROI):</u> With the lowest cost of total ownership and fastest speed to market, it's easy to see why organizations that choose AmpliFund for their grant management needs see the fastest, and greatest, return on their investment. Benefits of the platform are realized almost immediately, and administrative burdens are significantly reduced.***

When making a decision on a grant management solution, it is specifically important to note the total cost of ownership. As depicted below, the AmpliFund licensing model offers a number of cost-savings opportunities:

Total Cost of Ownership	AmpliFund Public Sector	CRM Solution	Custom-Built Solution
Internal users	Unlimited	Cost per user	Cost per user
External users	Unlimited	Cost per user	Cost per user
Internal staff resources to support the system	Not necessary	Necessary	Necessary
Product enhancements/upgrades	Configurable by end user *No additional cost*	Requires vendor development *Additional cost*	Requires vendor development *Additional cost*
Workflows			
Budgets & performance plans			
Custom reports			
Maintenance and product support	Included	Additional cost	Additional cost
Ongoing training	Unlimited	Additional cost	Additional cost
Dedicated help desk	Unlimited	Additional cost	Additional cost
Compliance with federal regulations	No additional cost	Additional cost	Additional cost

In addition to selecting a vendor that is providing the leading, most cost-effective, end-to-end grants management solution, the State should also consider partnering with an organization that is a thought leader, driving the grants management space at all levels of government. The grants management landscape has gone through a series of changes in the last few years (Uniform Grant Guidance, DATA Act), and it is logical to assume that more changes are coming. Adoption of AmpliFund assures that the State will be compliant with all key regulations and compliance requirements.

StreamLink Software has been a leader in the push for improved transparency and accountability related to federal grants, recipients, and sub-recipients. It actively supports federal grant management and reporting initiatives, including the Digital Accountability and Transparency Act (DATA Act), OMB Uniform Grant Guidance and the Treasury "Do Not Pay" Initiative via participation on Capitol Hill, involvement in advocacy groups, and educational content.

AmpliFund is endorsed by the Grant Professionals Association (GPA) and was selected by the U.S. Recovery Accountability and Transparency Board (RATB) for a national "proof-of-concept" pilot project affecting all federal grants, loans, contracts, and cooperative agreements. The company is a member of Data Transparency Coalition, an open-data advocacy organization, giving it a front row seat to reform conversations, resulting in a better understanding of federal processes, policies, and impact.

StreamLink Software is also regularly invited as subject matter experts in the industry to speak at local and national events on the topics of grant management, data transparency, and compliance. Recent appearances have included Data Transparency 2015, National Association of State Auditors, Comptrollers and Treasurers (NASACT)

Annual Conference, International City/County Management Association (ICMA) Annual Conference, National Grants Management Association (NGMA) Annual Conference, Grant Professionals Association (GPA) Annual Conference and the DATA Act Summit.

In addition to StreamLink Software's extensive experience managing grants in the public sector, the company has formed a strategic partnership with IBM. StreamLink Software and IBM came together strategically to solve the problem of grants management through the creation of a shared services product, GrantUS, at the Federal level. This product combines the configureable grants management features, data collection models and grant risk management tools from AmpliFund with the power of the leading predictive analytics and cognitive learning capability through IBM's solutions. The result of this shared service is a grant Center of Excellence driven by product data, as well as data from other systems such as the Federal Audit Clearing House, Policy Data, Social Media and area-specific data sources such as EPA reports and analysis. This Shared Service Center of Excellence has a governance structure supported by Federal, State and Local government. The core principle involved in the joint product and the Center of Excellence is that grants and grant decision making could best be supported through a data centric approach. The data centric approach is how we propose to support the State of Nevada. While the size of this initial contract will make it difficult to participate directly in the Center of Excellence, we will provide insights through our partnership to the State. As our relationship with the State grows along with the potential future expansion of our contract, the State could take a larger role within the Center.

Through the State's search for an end-to-end grants management solution, the agency has established itself as a leader in adapting best practices and prioritizing regulatory compliance. In choosing StreamLink Software for its grant management needs, the State would gain more than just a technology provider; it would gain a strategic partner equipped to help navigate both current and future grant management legislation and trends.

For additional insight and an overview of the grants management technology providers, please see the following Market Guide for U.S. State and Local Grant Management Solutions written by Gartner:

https://www.gartner.com/doc/3664917/market-guide-state-local-grant

The Research Director responsible for compiling this report can speak to the capabilities of the various grants management solutions currently available in the marketplace, and can be found at:

https://www.gartner.com/analyst/29450

5.1.11 Provide a brief description of the length of time vendor has been providing services described in this RFP to the public and/or private sector.

StreamLink Software has been providing AmpliFund to non-profit, public, and private sector clients since 2011.

5.1.12 Financial information and documentation to be included in accordance with ***Section 11.5, Part III – Confidential Financial Information***.

5.1.12.1 Dun and Bradstreet Number

041918948

5.1.12.2 Federal Tax Identification Number

271444897

5.1.12.3 The last two (2) years and current year interim:

A. Profit and Loss Statement
B. Balance Statement

StreamLink Software is a high-growth firm, supported financially by the State of Ohio as well as multiple Venture Capital funds in the Midwest and many angel investors. Most recently, the company secured an additional round of venture capital from a Midwest firm, securing its future for an extended period of time. More details can be provided upon advancing in the selection process.

5.2 SUBCONTRACTOR INFORMATION

Subcontractors are defined as a third party, not directly employed by the contractor, who shall provide services identified in this RFP. This does not include third parties who provide support or incidental services to the contractor.

5.2.1 Does this proposal include the use of subcontractors?

Yes		No	***x***

If "Yes", vendor shall:

5.2.1.1 Identify specific subcontractors and the specific requirements of this RFP for which each proposed subcontractor shall perform services.

5.2.1.2 If any tasks are to be completed by subcontractor(s), vendors shall:

A. Describe how the work of any subcontractor(s) shall be supervised, channels of communication shall be maintained and compliance with contract terms assured; and

B. Describe your previous experience with subcontractor(s).

5.2.1.3 Provide the same information for any proposed subcontractors as requested in ***Section 5.1, Vendor Information***.

5.2.1.4 Business references as specified in ***Section 5.3, Business References*** shall be provided for any proposed subcontractors.

5.2.1.5 Provide the same information for any proposed subcontractor staff as specified in ***Section 5.4, Vendor Staff Skills and Experience Required***.

5.2.1.6 Staff resumes for any proposed subcontractors as specified in ***Section 5.5, Vendor Staff Resumes***.

5.2.1.7 Vendor shall not allow any subcontractor to commence work until all insurance required of the subcontractor is provided to the vendor.

5.2.1.8 Vendor shall notify the using agency of the intended use of any subcontractors not identified within their original proposal and provide the information originally requested in the RFP in ***Section 5.2, Subcontractor Information***. The vendor shall receive agency approval prior to subcontractor commencing work.

5.2.1.9 All subcontractor employees assigned to the project shall be authorized to work in this country.

No subcontractors will be used for this project.

5.3 BUSINESS REFERENCES

5.3.1 Vendors shall provide a minimum of three (3) business references from similar projects performed for private and/or public sector clients within the last five (5) years.

5.3.2 Business references shall show a proven ability of:

5.3.2.1 Developing, designing, implementing and/or transferring a large scale application with public and/or private sectors;

5.3.2.2 Developing and executing a comprehensive application test plan;

5.3.2.3 Developing and implementing a comprehensive training plan;

5.3.2.4 Experience with comprehensive project management;

5.3.2.5 Experience with managing subcontractors; and

5.3.2.6 Development and execution of a comprehensive project management plan.

5.3.3 Vendors shall submit ***Attachment E, Reference Questionnaire*** to their business references.

5.3.4 It is the vendor's responsibility to ensure that completed forms are received by the Purchasing Division on or before the deadline as specified in ***Section 9, RFP Timeline*** for inclusion in the evaluation process. Reference Questionnaires not received, or not complete, may adversely affect the vendor's score in the evaluation process.

5.3.5 The State reserves the right to contact and verify any and all references listed regarding the quality and degree of satisfaction for such performance.

Attachment E, Reference Questionnaire has been sent to three AmpliFund references that meet the requirements outlined above, and will be returned to the State by the stated deadline.

5.4 VENDOR STAFF SKILLS AND EXPERIENCE REQUIRED

The vendor shall provide qualified personnel to perform the work necessary to accomplish the tasks defined in ***Section 4, Scope of Work***. The State shall approve all awarded vendor resources. The State reserves the right to require the removal of any member of the awarded vendor's staff from the project.

5.4.1 Project Manager Qualifications

The Project Manager assigned by the awarded vendor to the engagement shall have:

5.4.1.1 A minimum of four (4) years of project management experience, within the last ten (10) years, in government or the private sector;

5.4.1.2 A minimum of three (3) years of experience, within the last ten (10) years, managing systems architecture and development projects;

5.4.1.3 A minimum of two (2) years of experience with systems analysis and design;

5.4.1.4 A minimum of two (2) years of experience with systems development and implementation;

5.4.1.5 Completed at least one (1) project within the past three (3) years that involved designing business processes and procedures and developing new systems to support the new business processes; and

5.4.1.6 Completed at least one (1) project within the past three (3) years that involved communication and coordination of activities with external stakeholders.

5.4.2 Technical Lead Qualifications

The technical lead assigned by the awarded vendor shall have:

5.4.2.1 A minimum of four (4) years of experience in systems development, design and programming of automated systems;

5.4.2.2 A minimum of four (4) years of experience developing systems using a relational database;

5.4.2.3 A minimum of two (2) years of experience developing Internet applications;

5.4.2.4 A minimum of two (2) years of experience managing systems architecture and systems development projects; and

5.4.2.5 Completed at least (1) project within the past three (3) years that involved conducting a pilot implementation and determining the readiness of the system production.

5.4.3 Implementation Lead Qualifications

The implementation lead assigned by the awarded vendor shall have:

5.4.3.1 A minimum of three (3) years of experience managing the implementation of new business processes and procedures and new automated systems to support the new business processes;

5.4.3.2 A minimum of two (2) years of experience managing the implementation of Internet applications;

5.4.3.3 Completed at least one (1) project within the past three (3) years that involved the procurement, receipt and make ready of computer equipment and software; and

5.4.3.4 Completed at least one (1) project within the past three (3) years that involved a phased implementation where systems activities were coordinated between the old and new system environments.

5.4.4 Individual Team Member Qualifications

Each member of the awarded vendor's project team shall meet at least one (1) of the qualifications below. In addition, the aggregation of the individual qualifications of the team members shall cumulatively meet all of the following requirements. These requirements are:

5.4.4.1 Two (2) years of experience within the last five (5) years analyzing and modeling business processes;

5.4.4.2 Two (2) years of experience within the last five (5) years designing online interfaces using the tools proposed for this project;

5.4.4.3 Three (3) years of experience within the last five (5) years developing systems using the relational database proposed for this project;

5.4.4.4 Three (3) years of experience within the last five (5) years developing system to system interfaces;

5.4.4.5 Three (3) years of experience within the last five years developing secure Internet applications using the tools proposed for this project; and

5.4.4.6 Completed at least one (1) project within the past three (3) years that involved development of course outlines and materials and organizing and conducting classes to support the implementation of new business processes and systems.

Details regarding the well-qualified staff on the AmpliFund team have been included in the Proposed Staff Resumes (Attachment H).

5.5 VENDOR STAFF RESUMES

A resume shall be completed for each proposed individual on the State format provided in ***Attachment H, Proposed Staff Resume,*** including identification of key personnel per ***Section 12.3.19, Key Personnel.***

Please see Attachment H for further details regarding his requirement.

5.6 PRELIMINARY PROJECT PLAN

5.6.1 Vendors shall submit a preliminary project plan as part of the proposal, including, but not limited to:

5.6.1.1 Gantt charts that show all proposed project activities;

5.6.1.2 Planning methodologies;

5.6.1.3 Milestones;

5.6.1.4 Task conflicts and/or interdependencies;

5.6.1.5 Estimated time frame for each task identified in ***Section 4, Scope of Work***; and

5.6.1.6 Overall estimated time frame from project start to completion for both vendor and State activities, including strategies to avoid schedule slippage.

5.6.2 Vendors shall provide a written plan addressing the roles and responsibilities and method of communication between the contractor and any subcontractor(s).

5.6.3 The preliminary project plan shall be incorporated into the contract.

5.6.4 The first project deliverable is the finalized detailed project plan that shall include fixed deliverable due dates for all subsequent project tasks as defined in ***Section 4, Scope of Work***. The contract shall be amended to include the State approved detailed project plan.

5.6.5 Vendors shall identify all potential risks associated with the project, their proposed plan to mitigate the potential risks and include recommended strategies for managing those risks.

5.6.6 Vendors shall provide information on the staff that shall be located onsite in Carson City. If staff shall be located at remote locations, vendors shall include specific information on plans to accommodate the exchange of information and transfer of technical and procedural knowledge. The State encourages alternate methods of communication other than in person meetings, such as transmission of documents via email and teleconferencing, as appropriate.

Please see Exhibit H for a detailed project plan adhereing to the above requirements.

The current project plan and cost schedule estimate that key project staff will attend 4 multi-day onsite meetings in Carson City (Kickoff, Requirements Gathering, Testing/Training, Post Implementation Evaluation Review). All other work is assumed to be provided remotely from Cleveland, Ohio. Webinar meetings, phone calls, email communications, and the online AmpliFund Support Portal will be leveraged to exchange information and transfer technical and procedural knowledge. This aligns with the AmpliFund team's standard methodology used to roll out the platform for new clients, and promotes lower costs via reduced travel expenses and time commitments (for both the client and the AmpliFund team). Please note that additional multi-day onsite meetings in Carson City can certainly be accommodated if desired by the State.

While the scope of this project and required functionality align very well with the AmpliFund solution, there are inevitably still risks associated with a project of this size and scale. Additional risks may be identified as the project moves through its respective phases, but a brief description of some of the initial risk, along with an approach to manage them is as follows:

<u>1. Project Sponsorship</u> – Initiatives such as this one need support from the most senior level resources in order to effectively communicate the importance of the project and the need for it to drive business value. When team members do not feel that senior leadership views this as a priority, it will affect decision making and potentially budget, scope, and timeline.

***Mitigation Approach* – In the event that the sponsors are not already involved in status calls, requirements sessions, etc., at least 1 Status Meeting a month should be attended in order to show their support and commitment to the project, as well as help resolve critical path items.**

***2. Timely Decision Making* – There will be many decisions made throughout the life of this project. Not all decisions are equally weighted, but ultimately, there will be critical path items that need to be resolved in order to make progress.**

***Mitigation Approach* – Status reports need to identify open action items (issues, risks, questions, to-dos, etc.) and their associated risk (scope, budget, timeline) in the event that they are not resolved. The ability to clearly document and articulate these items during status updates allows all team members to understand the risks associated with not making timely decisions.**

***3. Willingness to standardize business process* – The State has expressed the desire to standardize the core business processes across all 25 agencies. Each agency may have slightly different requirements, but the State should understand that in order to gain the efficiency and effectiveness that AmpliFund offers, standardization needs to occur. This will drive adoption, create administrative efficiency, facilitate audits, and identify/assess risks.**

***Mitigation Approach* – As requirements and the desired business processes are being documented, the project team should have proper representation from relevant agencies to ensure critical requirements are being addressed. Specifically, agency-only requirements could hinder the business benefits of AmpliFund and not drive the standardization the State is seeking.**

***4. Client Resource Availability* – In order to successfully rollout an initiative of this scale, the commitment and availability of State resources is critical. As a SaaS solution, the ability to configure, test, and onboard agencies is far quicker than traditional means, but it also requires that the resources are available to drive and complete the necessary work. Lack of resources will ultimately affect budget, timeline, and potentially scope.**

***Mitigation Approach* – During the Project Planning Phase, roles and responsibilities of client team members need to be identified along with the time they have allocated to the project. If it is deemed to not be adequate or other priorities take precedence during the project, this will be identified as a risk and joint corrective action will need to take place in order to keep the project on schedule**

5.7 PROJECT SOFTWARE TOOLS

5.7.1 Vendors shall describe any software tools and equipment resources to be utilized during the course of the project including minimum hardware requirements and compatibility with existing computing resources as described in ***Section 2.4, Current Computing Environment***.

As a SaaS solution, AmpliFund does not require any software tools, hardware, or equipement resources. The platform is available via any device with internet connection and a standard supported web browser.

5.7.2 Costs and training associated with the project software tools identified shall be included in ***Attachment I, Project Costs.***

Project software tools are not required for this project.

Section VIII – Attachment H – Proposed Staff Resumes

© StreamLink™ Software

PROPOSED STAFF RESUME FOR RFP 3474

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***StreamLink Software, Inc.***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***X***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Steve Kosko***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Subject Matter Expert***		
# of Years in Classification:	***15***	**# of Years with Firm:**	***2***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Marketing and eCommerce Technology Senior Executive with proven expertise in generating business impact for both clients and the organization. Areas of responsibilities span Operations, Sales, Delivery, and Performance Management for growth organizations that need to scale in order to meet the high demands for its products and services.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

StreamLink Software 7/2015 – present

Chief Revenue Officer

- Responsible for all functions in Sales, Marketing and Customer Satisfaction/Retention by creating and maintaining a revenue generation process that aligned with the strategic direction of the company
  - Overseas and manages the sales and customer service delivery team
  - Developing growth strategies with the executive team and board of directors
  - Focused on developing and software delivery programs that generate annual recurring revenue
  - Monitor the strategies and process across the revenue cycle from customer acquisition to engagement to retention.
  - Oversees all Channel/Partner Development programs

Rosetta 3/2007 – 4/1/2015

Partner

- Responsible for Business Development, Account Management, Delivery, and Client Satisfaction of technology focused marketing solutions. In an effort to place as many Business Development and Delivery Partners in the market as possible, operational responsibilities were removed to focus purely on selling and delivering for clients
  - Doubled Portfolio of clients that are actively managed
  - Serve as an eCommerce (B2B/B2C) SME within the agency
  - Continue to serve in a support role regarding Operations

Partner, B2B (Manufacturing/Distribution) Industry Vertical Lead 9/2008 – 12/201

- In addition to Business Development, Account Management, Delivery, and Client Satisfaction for a portfolio of clients, was also responsible for a newly formed P&L that was focused on the B2B Industry and its technology centered marketing challenges
  - Assumed Operational and P&L responsibility in 2009 and exceeded target revenue and margin goals
  - Starting with 2009 as the baseline year, experienced CAGR that was unsurpassed in the agency (30%+)

PROPOSED STAFF RESUME FOR RFP 3474

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***StreamLink Software, Inc.***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***x***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Eric Birnesser***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Integration Analyst/ Development Lead***		
# of Years in Classification:	***4***	**# of Years with Firm:**	***2***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Results driven professional with over 9 years+ experience in the software development industry.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

VP of Development, Senior Architect at StreamLink Software
February 2015 - Present
Lead developer and team lead for all feature development on AmpliFund. Support and troubleshoot existing software in production. Demonstrate strong ability to write, troubleshoot, and optimize code for efficiency. Develop high quality, documented, and unit tested code that meets the requirements and timelines committed to the product team. Present new code design and implementation patterns, as well as potential enhancements to the existing code base to peers for review as part of our overall code quality process. Demonstrate solid understanding of Microsoft and industry best practices for web application architecture and design principles. Keep current on latest industry trends and application design patterns, including user interface and usability. Manage the growth and development of a team of engineers focused on the architecture of the production system.

Senior Software Engineer, Project Lead at One Call Now
July 2013 - February 2015 (1 year 8 months)
Use knowledge of ASP.NET (MVC and Web Forms), C#, Javascript (including jQuery, Knockout, and Angular), and SQL to develop and support the main production system on all tiers of the application in an Agile environment. Provide time and resource estimates to product owners on new development and
fixes to the current application. Manage the growth and development of a team of engineers focused on the architecture of the production system. Perform code reviews and write/review all unit tests to ensure code quality of all new development (NUnit and Rhino Mocks). Perform production demonstrations for business support and sales at each release, ensuring that all expectations are met.

Additional responsibilities include:
Team lead of Third Party Integration (Pearson, Yardi Systems, etc.)
Troubleshoot and fix production system escalations
Perform quarterly educational sessions on under-utilized skills and technologies such as TDD, NCrunch, Rhino Mocks, ReSharper, and EF Code-First
Write/review all technical documentation for new development

Programmer Analyst at Oswald Companies
May 2008 - June 2013 (5 years 2 months)
Lead developer on all internal solutions. Support all lines of business on existing and proprietary software, mostly dealing with .NET and Microsoft Office solutions. Support the Data Architect in managing the structure and flow of

all enterprise data (SQL 2005 & 2008). Utilize knowledge of C#, SQL, JavaScript, and VBA to provide web and desktop solutions to both internal and external customers.

Additional responsibilities include:
Author for enterprise and client#facing Crystal Reports
Lead developer for COM object creation used to fill functionality gaps in legacy systems
Backup author for BlueSky reports in the subject areas of Booked Revenue, Book of Business and General Claims
Technical lead on HDMS DART system - Power-User & Vendor Liaison
Architectural discussion/design related to exposing warehouse data to enterprise applications and other software clients as services using Visio for visual representation

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Notre Dame College

Bachelor of Arts (B.A.), Business Administration and Management, General, 2004 - 2008

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software, tools and databases.

ASP.NET
Web Applications
C#
ASP.NET Web API
WCF Services
jQuery
HTML
CSS
Strategic Planning
ADO.NET
Unit Testing
Test Driven Development Entity Framework
Visual Studio
MVC
SQL
IoC
JavaScript
KnockoutJS
Git Leadership
LINQ
TFS
NUnit
Data Analysis

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Matt Ginter, Data Architect at Oswald Companies, mginter@oswaldcompanies.com
Daniel Bartkowski, App Developer at Insight2Profit, daniel.bartkowski@live.com
Jerome Hill, Software Development Manager at Ygrene Energy Fund, jerome.hill@gmail.com

PROPOSED STAFF RESUME FOR RFP 3474

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***StreamLink Software, Inc.***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***x***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Kevin French***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Project Manager***		
# of Years in Classification:	***3.5***	**# of Years with Firm:**	***7***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Results driven account professional with over 15 years' experience in consistently delivering exceptional customer focused results to all stakeholders. Highly organized and detailed oriented team player with additional skills in project management, customer service, sales, product training and product development.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

StreamLink Software—Cleveland, OH

VP of Account Management, 2017 - Present

- Manage high-value/strategic accounts serving as Project Manager/Account Manager by developing relationships at multiple levels within the account to maximize subscription ARR, while ensuring implementation, adoption, customer satisfaction and renewal.
- Currently building the overall Account Management strategy for the company.

VP of Customer Success, 2014 - 2016

- Managed team of 6.5 employees responsible for all implementation programs, retention and account expansion for StreamLink.
- Create annual strategic initiatives to ensure strong customer retention, including creating plans for expanding Customer Success team
- Manage all customer retention processes for all of StreamLink's product lines
  - Planned, developed, and implemented policies and objectives of customer service in accordance with objectives of organization
  - Provided direction to employees engaged in customer service that provide product support
  - Provided direct customer support by investigating, evaluating, and settling complaints and other providing other related customer-focused services.
  - Developed product implementation processes, including product customization, training

Director of Account Management, 2010 –2013

Managed ever-increasing revenue responsibilities, from a $200K to over $1 million in ARR for the BoardMax Software platform

- Recruited, hired, retained, high performing employees who achieved team sales expectations.
- Served as the leading sales representative, while managing inside sales and customer success teams for BoardMax product platform.

Cleveland Clinic, Cleveland, Ohio

Program Manager - Community Outreach, 2006- 2009

- Directed and managed comprehensive and effective employee outreach programs for the Cleveland Clinic.
  - Organized 60 Employee Outreach Activities attended by over 1,400 employees totaling 6,000 hours of service
  - Served as a project manager during Cleveland Clinic's Habitat for Humanity home build project
- Convened Employee Outreach Advisory Council, comprised of 35 employees in leadership positions
- Served as faculty in the Cleveland Clinic Academy (CCA) by helping lead *Developing Leadership Skills on Non-Profit Boards*
- Provided consultation services to Cleveland Clinic Departments looking to enhance employee community engagement

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Ashland University, Ashland, Ohio – *Masters in Business Administration* 2007
- Specialization in Project Management

Xavier University, Cincinnati, Ohio – *Bachelor of Science in Marketing* 2000
- American College Dublin, Ireland Fall, 1998
  - Studied international business and marketing

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software, tools and databases.

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Ms. Pamela Marshall Holmes
Senior Director, Government Relations
Cleveland Clinic
holmesp@ccf.org
216-444-1243

Sr. Mary Kay Conkey
Executive Director
House of Champions
Nun4kids@yahoo.com
216-939-8330

Mr. Dave Carpenter
Principal
LUMA Property Group
Carpe04@yahoo.com
216-765-2600

PROPOSED STAFF RESUME FOR RFP 3474

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***StreamLink Software, Inc.***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***x***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Christina Pellegrino***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Change Management/Training Lead***		
# of Years in Classification:	***4***	**# of Years with Firm:**	***5***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

Highly motivated training lead with experience in training small and large groups across a multitude of organizations. Proven success in leveraging theories and methodologies to design, develop, and deliver success training programs.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

StreamLink Software, Incorporated

Product Trainer August 2013-Present

- Educates and trains customers on effective product use
- Designs and plans all training content
- Provides support and troubleshooting to all customers
- Creates and revises complete user help guide for new version of product
- Edits and contributes content for all technical manuals and materials

Product Sales Specialist May 2012-August 2013

- Researched prospective buyers to contact
- Contacted prospective customers to provide product information
- Provided product demonstrations to demonstration value of AmpliFund product

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

John Carroll University - University Heights, Ohio

Bachelor of Science in Business Administration May 2012

Concentration in Finance

Minor in Spanish

Regent's College - London, United Kingdom

Study Abroad Program January-May 2010

Traveled to Scotland, Ireland, Italy, and Germany

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software, tools and databases.

Proficient in Microsoft Word, Access, Excel, and PowerPoint
Experienced in Microsoft and Macintosh Operating Systems

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Steve Kosko
skosko@streamlinksoftware.com
216-377-5500

Camille Beatty Falor
cbfdrf@gmail.com
216-496-3420

Maribeth Leschinsky
mb_lesch@hotmail.com

PROPOSED STAFF RESUME FOR RFP 3474

A resume must be completed for all proposed prime contractor staff and proposed subcontractor staff.

Company Name Submitting Proposal:	***StreamLink Software, Inc.***

Check the appropriate box if the proposed individual is prime contractor staff or subcontractor staff.			
Contractor:	***x***	**Subcontractor:**	

The following information requested pertains to the individual being proposed for this project.			
Name:	***Chip C. Prosser***	**Key Personnel: (Yes/No)**	***Yes***
Classification; i.e., Project Manager, Implementation Lead, etc.	***Q/A Testing Analyst***		
# of Years in Classification:	***12***	**# of Years with Firm:**	***2***

BRIEF SUMMARY OF PROFESSIONAL EXPERIENCE

Information should include a brief summary of the proposed individual's professional experience.

A meticulous and progressive individual, with a consistent track record of exceeding expectations in 9+ years of software quality experience in technological industries across an array of SDLC methodologies and structures.

RELEVANT EXPERIENCE

Information required should include: timeframe, company name, company location, position title held during the term of the project/position and software/hardware used during the project engagement.

SQA Analyst II (July 2015 – Present)

1.1 ***StreamLink Software – Cleveland, OH***

- Thorough, detailed approach to documenting, analyzing, and executing test cases pertaining to grant management activities in an Agile development environment.
- Leveraging browser defect monitoring tools to narrow and assist development in identifying and correcting system defects.
- Query/manipulation of database information via SQL, log monitoring, troubleshooting system defects.
- Administration/organization of daily/weekly spints via scrum board.
- Liaison to bridge gap between client success and development.
- Smoke test automation (Sikuli/Python)

Project Manager/Technical Analyst (March 2014 – July 2015)

1.2 ***Strategic Education Technologies – Beachwood, OH***

- Management of all aspects of a highly complex SaaS web system that houses a wide array of user types for college planning and financing.
- Generation/gathering of requirements from system stakeholders and translation into thorough technical specification.

Senior Software Quality Specialist (June 2012 – February 2014)

1.3 ***Oracle (formerly Micros-Retail) – Solon, OH***

- Database validation via SQL, manipulation of configuration files via XML, log monitoring, troubleshooting system defects.
- Generation of extremely thorough test & usability plans and scripts for iOS- and Java-based point-of-sale applications for high profile clients in the retail industry.
- Implementation and standardization of internal processes and best practices to ensure delivery of high quality products across multiple platforms.

SQA Analyst, Applications Engineer (May 2005 – May 2012)

1.4 ***Universal Electronics, Inc. – Santa Ana, CA***

- Program management activities during definition/feasibility stages for concurrent clients via coordination with cross-functional engineering teams.
- Responsible for ensuring cost optimization of product components and accuracy of bill of materials for schematic designs of consumer electronics products in the home entertainment industry.
- Development and execution of extremely thorough test plans/scripts for web, Android/iOS, and MCU-based projects.

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

Bachelor of Business Administration in Economics (2013)

Kent State University – Kent, OH

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software, tools and databases.

- SQL, XML, variety of Project/Defect Tracking Systems (Trello, Jira)
- Strong SDLC, Agile competencies
- Array of proprietary SaaS & database systems
- Sikuli 1.1.x automation
- HP QC familiarity
- MS Office Suite

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Quoctruong Ngo, Project Manager & Agile Coach
(310) 462-2355 (PST)
quoctruongngo@gmail.com

Cory Lavinder, Lead QE Retail
Nike
(503) 267-9219 (PST)
cory.lavinder@nike.com

Arsham Hatambeiki, VP Corporate Product Strategy & Development
Universal Electronics, Inc
(714) 316-4519 (PST)
arsham@ueic.com

- In terms of Performance Management, was ranked in top 25% of Partners in 2009 and top 10% in both 2010 and 2011

Associate Partner 3/2007 – 9/2008

- Responsible for Business Development, Account Management, Delivery, and Client Satisfaction of technology focused marketing solutions
  - Initial focus as an Associate Partner centered around website development and B2C eCommerce

Axentix 1/2003 – 3/2007

Senior Manager, Professional Services

- Responsible for Business Development, Account Management, Delivery, and Product Development of the Axentis Enterprise software platform
  - Design through Delivery of the Risk Management Module for Sarbanes-Oxley Compliance for companies ranging from $500 Million to $50 Billion
  - Played instrumental role in the Sales Cycle in terms of qualifying, scoping, presenting, and closing business
  - Functional Design Lead of transforming the software from a general compliance platform into a targeted application to address SOX compliance

Acero 9/2001 – 10/2002

Senior Manager – Implementation Services

- Responsible for Account Management and Delivery of a Genomics Software Platform that was leveraged by Pharmaceutical companies in the drug discovery process

Brulant 1/2001 – 9/2001

Associate Partner

- Responsible for Business Development, Account Management, and Delivery of custom and package software applications for platinum level accounts

Solutions Consulting 11/1998 – 12/2000

Senior Consultant

- Responsible for implementation of SAP for an integrated metals manufacturer
  - Designed and Configured all business processed required for the Production Planning (PP) and Materials Management (MM) Modules
  - Managed the Conversion effort associated with PP and MM modules (materials, inventory, work orders, and WIP)
  - Designed and Delivered a custom melt shop formulation application that was used to determine “recipe” for all shipped product

Accenture (formerly Anderson Consulting) 8/1993 – 11/1998

Manager

- Responsible for multiple roles in the Delivery of custom and package business applications for Fortune 1000 companies, including:
  - Development / Coding
  - Business Analysis / Requirements Definition
  - Business Process Engineering / Functional Design
  - Interface Design
  - Project Management

EDUCATION

Information required should include: institution name, city, state, degree and/or Achievement and date completed/received.

B.S., Manufacturing Engineering, Miami University, Oxford, OH 1993

CERTIFICATIONS

Information required should include: type of certification and date completed/received.

HARDWARE/SOFTWARE SUMMARY (BE SPECIFIC)

Information required should include: environments, hardware, software,

tools and databases.

REFERENCES

A minimum of three (3) references are required, including name, phone number, fax number and email address.

Kierston Gedeon
SVP, Talent Strategy
Robots and Pencils
(m) 216.287.5065
kierston.gedeon@robotsandpencils.com

Mike Chenelle
Partner, Global Operations Lead
SapientRazorfish
(m) 216.233.1690
Mike.chenelle@rosetta.com

Brad Wertz
Chairman and CEO
GenomeOncology
(m) 440.823.9954
bradwertz@gmail.com

Section IX – Preliminary Project Plan

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AmpliFund Implementation Project Plan

StreamLink took a great deal of time to develop an initial project plan that tries to meet the State's objectives with regards to Scope, Budget, and Timeline. While we understand that some of our interpretations of the RFP may be incorrect, we hope the State sees this as a genuine effort to meet your objectives. In addition to providing a project plan, a brief overview has been created to provide the proper context to the approach. Because StreamLink has its own implementation approach with its own terminology, an effort has been made to tie this overview to the Scope of Work in the RFP to avoid confusion.

StreamLink feels that the best way to rollout a full lifecycle grant solution is to incrementally go-live with specific pieces of functionality. At a high level, the plan is as follows:

- Perform Planning & Administration (4.4) and Change Management (4.5) with regards to all functionality that will ultimately be deployed beginning October 2017.
- Perform associated Pre-Grant Award Setup (4.6) activities and go-live with this functionality for all State Agencies beginning October 2017
- Perform the portion of Sub-Recipient Setup (4.8) that deals with the State posting online applications beginning in January 2018, performing the review in May 2018, and culminating in the generation of a Grant Award in June 2018. This functionality would be deployed for all State Agencies
- Perform Post-Grant Award Setup (4.7) and remaining Sub-Recipient Setup (4.8) to manage all aspects of Post Award, both for the State and for its recipients, beginning July 2018. The Post-Grant Award Setup would be for 3 Agencies in order to validate the design and make any appropriate updates.
- After sufficient time has passed to validate the 3 Agencies with regards to Post Grant Award, a mutually agreed upon rollout plan of the remaining Agencies will take place. Because this will be heavily dependent on the availability of State resources, StreamLink did not want to make any incorrect assumptions on how quickly the remaining rollouts could be accomplished.

While we acknowledge your request a certain number of days related to specific review periods, we believe that the estimated time frames below are realistic based upon previous experiences and may be shorter or longer then the estimated duration of the State. In the event we continue in this RFP process, we look forward to reviewing this approach in detail and making any appropriate adjustments.

Final Note: With regards to 5.6.2 concerning the use of subcontractors, StreamLink does not plan to utilize subcontractors for this engagement.

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
1	**1**	**AmpliFund Implementation** *(Enterprise Grants Management Solution)*	n/a	n/a	no				
2	**1.1**	**Project Initiation: Project Kick Off Meeting (Scope of Work 4.3)**	n/a	SL,NV	no	8 days	10/1/2017	10/8/2017	
3	1.1.1	Create project kick-off meeting materials	n/a	SL	no	1 day	10/1/2017	10/1/2017	
4	1.1.2	Conduct project kick-off meeting (Deliverable 4.3)	1.1.2	SL,NV	YES	1 day	10/2/2017	10/2/2017	
5	1.1.3	Establish critical project dates based on contract scope	1.1.3	SL,NV	no	3 days	10/3/2017	10/5/2017	
6	1.1.4	Create Client's AmpliFund Instance	n/a	SL	no	1 day	10/6/2017	10/6/2017	
7	1.1.5	Complete Project Kick-Off Documentation	1.1.3	SL,NV	no	1 day	10/7/2017	10/7/2017	
8	***1.1.6***	***Deliverables (Initiation)***	n/a	SL	no	1 day	10/8/2017	10/8/2017	
9	***1.1.6.1***	***Kick-off meeting materials***	1.1.1	SL	no	1 day	10/8/2017	10/8/2017	
10	***1.1.6.2***	***High-level project timeline***	1.1.3	SL	no	1 day	10/8/2017	10/8/2017	
11	***1.1.6.3***	***AmpliFund account set-up form***	1.1.1	SL	no	1 day	10/8/2017	10/8/2017	
12	**1.2**	**Project Planning: Planning and Administration (Scope of Work 4.4)**	1.1	SL,NV	no	27 days	10/9/2017	9/30/2018	certain project planning tasks occur throughout project life
13	1.2.1	Develop project management plan (PMP) and PMP sub-plans (Deliverable 4.4.3.1)	1.1.6.1, 1.1.6.2	SL	YES	10 days	10/9/2017	10/18/2017	
14	1.2.2	Finalize project staffing	1.2.1	SL,NV	no	5 days	10/18/2017	10/22/2017	
15	1.2.3	Identify project stakeholders (both internal and external)	1.2.2	SL,NV	no	5 days	10/23/2017	10/27/2017	
16	1.2.4	Attendance at all scheduled meetings (Deliverable 4.4.3.2)	1.2.1	SL,NV	no	N/A			Occurs throughout project life
17	1.2.5	Written semi-montly project status report (Deliverable 4.4.3.3)	1.2.4	SL	no	24 days	10/9/2017	9/30/2018	
18	1.2.6	Develop Communication Plan (Deliverable 4.4.3.4)	1.2.1	SL	no	5 days	10/9/2017	10/13/2017	
19	1.2.7	Develop Risk Management Plan (Deliverable 4.4.3.5)	1.2.1	SL	no	5 days	10/9/2017	10/13/2017	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
20	1.2.8	Develop Quality Assurance Plan (Deliverable 4.4.3.6)	1.2.1	SL	no	10 days	10/9/2017	10/19/2017	
21	1.2.9	Develop Knowledge Transfer Plan (Deliverable 4.4.3.7)	1.2.1	SL	no	10 days	10/9/2017	10/19/2017	
22	*1.2.10*	*Deliverables (Planning)*	n/a	SL	no	1 day	10/19/2017	10/19/2017	
23	*1.2.10.1*	*Project team contact list*	1.2.2	SL	no	1 day	10/19/2017	10/19/2017	
24	*1.2.10.2*	*Project team roles and responsibilities*	1.2.2	SL	no	1 day	10/19/2017	10/19/2017	
25	*1.2.10.3*	*Project plan summary*	1.2.1	SL	no	1 day	10/19/2017	10/19/2017	
26	*1.2.10.4*	*Scope management plan*	1.2.1	SL	no	1 day	10/19/2017	10/19/2017	
27	*1.2.10.5*	*Project plan (Deliverable 4.4.3.1)*	1.2.1	SL	no	1 day	10/19/2017	10/19/2017	
28	*1.2.10.6*	*Communication plan (Deliverable 4.4.3.4)*	1.2.6	SL	no	1 day	10/19/2017	10/19/2017	
29	*1.2.10.7*	*Risk Management Plan (Deliverable 4.4.3.5)*	1.2.7	SL	no	1 day	10/19/2017	10/19/2017	
30	*1.2.10.8*	*Quality Assurance Plan (Deliverable 4.4.3.6)*	1.2.8	SL	no	1 day	10/19/2017	10/19/2017	
31	*1.2.10.9*	*Knowledge Transfer Plan (Deliverable 4.4.3.7)*	1.2.9	SL	no	1 day	10/19/2017	10/19/2017	
32	*1.2.10.10*	*Issue tracking log*	1.2.1	SL	no	1 day	10/19/2017	10/19/2017	
33	**1.3**	**Project Analysis: Change Management Plan (Scope of Work 4.5)**	1.2	SL,NV	no	48 days	10/20/2017	12/6/2017	
34	1.3.1	Conduct overview business process and gap analysis workshops	1.2	SL,NV	no	5 days	10/20/2017	10/24/2017	
35	1.3.2	Appropriate information gathered for next step to begin (Deliverable 4.5.3.1)	1.3.1	SL,NV	no	5 days	10/24/2017	10/28/2017	
36	1.3.3	Document workshop findings	1.3.1	SL	no	3 days	10/24/2017	10/26/2017	
37	1.3.4	Processes shall be documented (Deliverable 4.5.3.2)	1.3.1	SL	YES	5 days	10/26/2017	10/30/2017	
38	1.3.5	Document scope changes (if applicable)	1.3.4	SL	no	3 days	10/30/2017	11/1/2017	
39	1.3.6	Determine if increased funding is needed (Deliverable 4.5.3.4)	1.3.5	SL,NV	YES	5 days	11/1/2017	11/5/2017	
40	1.3.7	Adoption of any necessary revisions and acceptance (Deliverable 4.5.3.5)	1.3.6	SL,NV	no	5 days	11/5/2017	11/9/2017	
41	1.3.8	Conduct API data integration analysis (if applicable)	1.3.7	SL,NV	no	8 days	11/9/2017	11/16/2017	
42	1.3.9	Conduct overview of system Configuration of AmpliFund Master Data Elements	1.3.7	SL,NV	no	3 days	11/17/2017	11/19/2017	
43	1.3.10	Conduct overview of system Module Configuration	1.3.9	SL,NV	no	3 days	11/20/2017	11/22/2017	
44	1.3.11	Conduct overview of Workflow Configuration	1.3.10	SL,NV	no	5 days	11/23/2017	11/27/2017	
45	1.3.12	Optimization of capabilities (Deliverable 4.5.3.3)	1.3.12	SL	no	5 days	11/28/2017	12/2/2017	
46	1.3.13	Execute communication plan tasks	1.3.11	SL,NV	no	3 days	12/3/2017	12/5/2017	
47	*1.3.14*	*Deliverables (Analysis)*	n/a	SL,NV	no	1 day	12/6/2017	12/6/2017	occurs concurrently
48	*1.3.14.1*	*Requirements and business process analysis plan (Deliverable 4.5.3.1 & 4.5.3.2)*	1.3.4	SL	YES	1 day	12/6/2017	12/6/2017	occurs concurrently
49	*1.3.14.2*	*Gap analysis*	1.3.3	SL	no	1 day	12/6/2017	12/6/2017	occurs concurrently
50	*1.3.14.3*	*Integration points analysis (if applicable)*	1.3.8	SL,NV	no	1 day	12/6/2017	12/6/2017	occurs concurrently
51	*1.3.14.4*	*Project scope revisions (Deliverable 4.5.3.4 & 4.5.3.5)*	1.3.7	SL	no	1 day	12/6/2017	12/6/2017	occurs concurrently
52	**2**	**Pre-Grant Award Setup (Scope of Work 4.6)**	1.3	SL,NV	no	149 days	10/1/2017	2/26/2018	
53	**2.1**	**Pre-Grant Analysis**	1.3	SL,NV	no	49 days	10/1/2017	11/18/2017	
54	2.1.1	Conduct business process and gap analysis workshops	1.3.11	SL,NV	no	3 days	10/1/2017	10/3/2017	
55	2.1.2	Document workshop findings	2.1.1	SL	no	2 days	10/4/2017	10/5/2017	
56	2.1.3	Document scope changes (if applicable)	2.1.2	SL	no	5 days	10/6/2017	10/10/2017	
57	2.1.4	Define System Configuration of AmpliFund Master Data Elements	2.1.2	SL,NV	no	3 days	10/11/2017	10/13/2017	
58	2.1.5	Define User Roles and Security	2.1.5	SL,NV	no	3 days	10/14/2017	10/16/2017	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
59	2.1.6	All users identified and documented (Deliverable 4.6.3.1)	2.1.5	SL	no	5 days	10/17/2017	10/21/2017	
60	2.1.7	Define Module Configuration	2.1.4	SL	no	3 days	10/22/2017	10/24/2017	
61	2.1.8	Define Workflow Configuration	2.1.7	SL	no	5 days	10/25/2017	10/29/2017	
62	2.1.9	Begin drafting configuration documents	2.1.8	SL	no	3 days	10/30/2017	11/1/2017	
63	2.1.10	Develop training strategy	2.1.8	SL	no	3 days	11/2/2017	11/4/2017	
64	2.1.11	Develop knowledge transfer plan	2.1.9	SL	no	3 days	11/5/2017	11/7/2017	
65	2.1.12	Increase funding as necessary (Deliverable 4.6.3.3)	2.1.3	SL,NV	no	10 days	11/8/2017	11/17/2017	
66	*2.1.13*	*Deliverables (Analysis)*	n/a	SL	no	1 day	11/18/2017	11/18/2017	occurs concurrently
67	*2.1.13.1*	*Requirements and business process analysis plan*	2.1.1	SL	YES	1 day	11/18/2017	11/18/2017	occurs concurrently
68	*2.1.13.2*	*Gap analysis*	2.1.1	SL	no	1 day	11/18/2017	11/18/2017	occurs concurrently
69	*2.1.13.3*	*Project scope revisions (if applicable)*	2.1.3	SL	no	1 day	11/18/2017	11/18/2017	occurs concurrently
70	*2.1.13.4*	*Training strategy*	2.1.10	SL	no	1 day	11/18/2017	11/18/2017	occurs concurrently
71	*2.1.13.5*	*Knowledge transfer plan*	2.1.11	SL	no	1 day	11/18/2017	11/18/2017	occurs concurrently
72	**2.2**	**Pre-Grant Configuration**	2.1	SL,NV	no	22 days	11/19/2017	12/10/2017	
73	2.2.1	Complete system configuration associated with relevant modules in test environment	2.1.9	SL	no	5 days	11/19/2017	11/23/2017	
74	2.2.2	Complete profiles (Deliverable 4.6.3.2)	2.1.6	SL	no	5 days	11/24/2017	11/28/2017	
75	2.2.3	Develop user acceptance testing (UAT) strategy, scenarios, and schedule	2.2.1	SL	no	5 days	11/29/2017	12/3/2017	
76	2.2.4	Design training curriculum and materials	2.1.10	SL	no	3 days	12/4/2017	12/6/2017	
77	2.2.5	Execute knowledge transfer plan tasks	2.1.11	SL,NV	no	3 days	12/7/2017	12/9/2017	
78	*2.2.6*	*Deliverables (Configuration)*	n/a	SL	no	1 day	12/10/2017	12/10/2017	occurs concurrently
79	*2.2.6.1*	*Configuration documents*	2.1.1	SL	no	1 day	12/10/2017	12/10/2017	occurs concurrently
80	*2.2.6.2*	*Configured test environment*	2.1.1	SL	no	1 day	12/10/2017	12/10/2017	occurs concurrently
81	*2.2.6.3*	*Testing strategies, scenarios and schedules for UAT*	2.2.3	SL	no	1 day	12/10/2017	12/10/2017	occurs concurrently
82	*2.2.6.4*	*Training material drafts*	2.2.4	SL	no	1 day	12/10/2017	12/10/2017	occurs concurrently
83	**2.3**	**Pre-Grant Testing**	2.2	SL,NV	no	26 days	12/10/2017	1/4/2017	
84	2.3.1	Manage, track, execute, and document UAT testing	2.2.3	SL	YES	10 days	12/10/2017	12/19/2017	
85	2.3.2	Develop, update, and maintain migration checklist	2.3.1	SL	no	5 days	12/20/2017	12/24/2017	
86	2.3.3	Prepare for configuration and data migration to Production site	2.3.2	SL	no	3 days	12/25/2017	12/27/2017	
87	2.3.4	Conduct train-the-trainer sessions	2.2.4	SL,NV	YES	3 days	12/28/2017	12/30/2017	
88	2.3.5	Execute communication plan tasks	2.3.4	SL,NV	no	2 days	12/31/2017	1/1/2018	
89	2.3.6	Execute knowledge transfer plan tasks	2.3.5	SL,NV	no	2 days	1/2/2018	1/3/2018	
90	*2.3.7*	*Deliverables (Testing)*	n/a	SL,NV	no	1 day	1/4/2017	1/4/2017	occurs concurrently
91	*2.3.7.1*	*UAT results*	2.3.1	SL	YES	1 day	1/4/2017	1/4/2017	occurs concurrently
92	*2.3.7.2*	*Training materials*	2.2.6.4	SL	no	1 day	1/4/2017	1/4/2017	occurs concurrently
93	*2.3.7.3*	*Train-the-trainer sessions*	2.3.7.2	SL,NV	YES	1 day	1/4/2017	1/4/2017	occurs concurrently
94	**2.4**	**Pre-Grant Migration**	2.3	SL,NV	no	10 days	1/5/2018	1/14/2018	
95	2.4.1	Complete configuration migration tasks	2.3.3	SL	no	3 days	1/5/2018	1/7/2018	
96	2.4.2	Complete data migration tasks	2.4.1	SL	no	3 days	1/8/2018	1/9/2018	
97	2.4.3	Execute communication plan tasks	2.4.2	SL,NV	no	2 days	1/10/2018	1/11/2018	
98	2.4.4	Execute knowledge transfer plan tasks	2.4.3	SL,NV	no	2 days	1/12/2018	1/13/2018	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
99	*2.4.5*	*Deliverables (Migration)*	n/a	SL	no	1 day	1/14/2018	1/14/2018	occurs concurrently
100	*2.4.5.1*	*Configuration migration checklist*	2.3.3	SL	no	1 day	1/14/2018	1/14/2018	occurs concurrently
101	*2.4.5.2*	*Data migration checklist*	2.3.3	SL	no	1 day	1/14/2018	1/14/2018	occurs concurrently
102	*2.4.5.3*	*Complete configuration migration checklist*	2.4.1	SL	no	1 day	1/14/2018	1/14/2018	occurs concurrently
103	*2.4.5.4*	*Complete data migration checklist*	2.4.2	SL	no	1 day	1/14/2018	1/14/2018	occurs concurrently
104	**2.5**	**Pre-Grant Go-Live**	2.4	SL,NV	no	43 days	1/15/2018	2/26/2018	
105	2.5.1	Complete production go-live readiness tasks	2.4.5.3,2.4.5.4	SL,NV	no	2 days	1/15/2018	1/16/2018	
106	2.5.2	Confirm that deployment to production site is complete	2.4.5.3,2.4.5.4	SL,NV	no	1 day	1/17/2018	1/17/2018	
107	2.5.3	Conduct end user training via Train the Trainer approach	2.5.2	SL,NV	no	3 days	1/18/2018	1/20/2018	
108	2.5.4	All users master process (Deliverable 4.6.3.4)	2.5.3	SL,NV	YES	15 days	1/21/2018	2/4/2018	
109	2.5.5	Adoption of any necessary revisions and acceptance (Deliverable 4.6.3.5)	2.5.4	SL,NV	YES	5 days	2/5/2018	2/9/2018	
110	2.5.6	Finalize project documents	2.5.5	SL	no	3 days	2/10/2018	2/12/2018	
111	2.5.7	Conduct knowledge transfer sessions	2.5.6	SL,NV	no	3 days	2/13/2018	2/15/2018	
112	2.5.8	Complete transition plan tasks	2.5.7	SL,NV	no	2 days	2/16/2018	2/17/2018	
113	2.5.9	Post Pre-Grant Implementation Evaluation Review	2.5.5	SL,NV	no	3 days	2/18/2018	2/20/2018	
114	2.5.10	Transition client to post implementation support for Pre-Grant	2.5.4	SL,NV	YES	5 days	2/21/2018	2/25/2018	
115	*2.5.11*	*Deliverables (Go-Live)*	n/a	SL,NV	no	1 day	2/26/2018	2/26/2018	
116	*2.5.11.1*	*Go-live readiness and production deployment checklist*	2.4.5.3,2.4.5.4	SL	no	1 day	2/26/2018	2/26/2018	
117	*2.5.11.2*	*Configured production environment*	2.5.2	SL	no	1 day	2/26/2018	2/26/2018	
118	*2.5.11.3*	*Final training materials*	2.3.7.2	SL	no	1 day	2/26/2018	2/26/2018	
119	*2.5.11.4*	*Final knowledge transfer plan*	2.5.7	SL	no	1 day	2/26/2018	2/26/2018	
120	*2.5.11.5*	*Final configuration documents*	2.5.5	SL	no	1 day	2/26/2018	2/26/2018	
121	*2.5.11.6*	*Knowledge transfer sessions*	2.5.7	SL,NV	no	1 day	2/26/2018	2/26/2018	
122	*2.5.11.7*	*Transition plan*	2.5.4	SL	no	1 day	2/26/2018	2/26/2018	
123	*2.5.11.8*	*Post Pre-Grant Implementation Evaluation Report*	2.5.9	SL,NV	no	1 day	2/26/2018	2/26/2018	
124	**3**	**Post-Grant Award Setup (Scope of Work 4.7)**	1.3	SL,NV	no	213 days	4/1/2017	10/30/2018	
125	**3.1**	**Post-Grant Analysis**	1.3	SL,NV	no		4/1/2018	7/15/2018	
126	3.1.1	Conduct business process and gap analysis workshops for (3) pilot agencies	1.3	SL,NV	no	5 days	4/1/2018	4/5/2018	
127	3.1.2	Document workshop findings	3.1.1	SL	no	5 days	4/6/2018	4/10/2018	
128	3.1.3	Document scope changes (if applicable)	3.1.2	SL	no	5 days	4/11/2018	4/15/2018	
129	3.1.4	Conduct API data integration analysis (if applicable)	3.1.3	SL,NV	no	15 days	4/16/2018	4/30/2018	
130	3.1.5	Define System Configuration of AmpliFund Master Data Elements for pilot agencies	3.1.3	SL,NV	no	10 days	5/1/2018	5/10/2018	occurs concurrently
131	3.1.6	Define User Roles and Security for pilot agencies	3.1.5	SL,NV	no	10 days	5/1/2018	5/10/2018	occurs concurrently
132	3.1.7	Define Module Configuration	3.1.5	SL,NV	no	10 days	5/1/2018	5/10/2018	occurs concurrently
133	3.1.8	Define Workflow Configuration	3.1.7	SL,NV	no	10 days	5/1/2018	5/10/2018	occurs concurrently
134	3.1.9	Inventory of active grant awards for pilot agencies (Deliverable 4.7.3.1)	3.1.3	SL,NV	no	30 days	5/11/2018	6/9/2018	occurs concurrently
135	3.1.10	Define active grant inventory data migration for pilot agencies	3.1.9	SL,NV	no	30 days	5/11/2018	6/9/2018	occurs concurrently
136	3.1.11	Begin drafting configuration documents	3.1.8	SL	no	10 days	6/10/2018	6/19/2018	occurs concurrently
137	3.1.12	Begin drafting data migration and data integration documents	3.1.11	SL,NV	no	10 days	6/20/2018	6/29/2018	occurs concurrently
138	3.1.13	Develop training strategy	3.1.10	SL	no	5 days	6/30/2018	7/4/2018	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
139	3.1.14	Develop knowledge transfer plan	3.1.10	SL	no	5 days	7/5/2018	7/9/2018	
140	3.1.15	Execute communication plan tasks	3.1.14	SL,NV	no	5 days	7/10/2018	7/14/2018	
141	*3.1.16*	*Deliverables (Analysis)*	n/a	SL,NV	no	1 day	7/15/2018	7/15/2018	
142	*3.1.16.1*	*Requirements and business process analysis plan for pilot*	3.1.3	SL	YES	1 day	7/15/2018	7/15/2018	
143	*3.1.16.2*	*Gap analysis for pilot*	3.1.3	SL	no	1 day	7/15/2018	7/15/2018	
144	*3.1.13.3*	*Integration points analysis*	3.1.4	SL,NV	no	1 day	7/15/2018	7/15/2018	
145	*3.1.13.4*	*Project scope revisions*	3.1.3	SL	no	1 day	7/15/2018	7/15/2018	
146	*3.1.13.5*	*Requirements traceability matrix*	3.1.10,3.1.11,3.1.12	SL	no	1 day	7/15/2018	7/15/2018	
147	*3.1.13.6*	*Training strategy*	3.1.13	SL	no	1 day	7/15/2018	7/15/2018	
148	*3.1.13.7*	*Knowledge transfer plan*	3.1.14	SL	no	1 day	7/15/2018	7/15/2018	
149	**3.2**	**Post-Grant Configuration**	3.1	SL,NV	no	29 days	7/16/2018	8/13/2018	
150	3.2.1	Complete system configuration associated with relevant modules in test environment	3.1.11,3.1.12	SL	no	5 days	7/16/2018	7/20/2018	
151	3.2.2	Migrate pilot agency active grant award data via AmpliFund templates	3.1.10	SL,NV	no	10 days	7/21/2018	7/30/2018	occurs concurrently
152	3.2.3	Build data integrations via AmpliFund API (if applicable)	3.1.13.4	SL,NV	no	10 days	7/21/2018	7/30/2018	occurs concurrently
153	3.2.4	Develop user acceptance testing (UAT) strategy and scenarios	3.1.11,3.1.12	SL	no	8 days	7/31/2018	8/7/2018	occurs concurrently
154	3.2.5	Develop pilot agency active grant award data testing strategy and scenarios	3.2.2	SL	no	5 days	7/31/2018	8/4/2018	occurs concurrently
155	3.2.6	Develop data integration testing strategy and scenarios	3.2.3	SL	no	8 days	7/31/2018	8/7/2018	occurs concurrently
156	3.2.7	Create testing master plan and schedules	3.2.4,3.2.5,3.2.6	SL	no	3 days	8/8/2018	8/10/2018	occurs concurrently
157	3.2.8	Design training curriculum and materials	3.1.13.6	SL	no	2 days	8/9/2018	8/10/2018	occurs concurrently
158	3.2.9	Execute communication plan tasks	3.2.8	SL,NV	no	2 days	8/11/2018	8/12/2018	occurs concurrently
159	3.2.10	Execute knowledge transfer plan tasks	3.2.10	SL,NV	no	2 days	8/11/2018	8/12/2018	occurs concurrently
160	*3.2.11*	*Deliverables (Configuration)*	n/a	SL,NV	no	1 day	8/13/2018	8/13/2018	
161	*3.2.11.1*	*Configuration documents*	3.2.1	SL	no	1 day	8/13/2018	8/13/2018	
162	*3.2.11.2*	*Integration documents*	3.2.3,3.2.6	SL,NV	no	1 day	8/13/2018	8/13/2018	
163	*3.2.11.3*	*Pilot agency active grant award data mapping plan*	3.2.2	SL,NV	no	1 day	8/13/2018	8/13/2018	
164	*3.2.11.4*	*Integration points plan*	3.2.11.2	SL,NV	no	1 day	8/13/2018	8/13/2018	
165	*3.2.11.5*	*Data conversion and integration report*	3.2.5,3.2.6	SL,NV	no	1 day	8/13/2018	8/13/2018	
166	*3.2.11.6*	*Configured test environment*	3.2.11.1	SL	no	1 day	8/13/2018	8/13/2018	
167	*3.2.11.7*	*Testing strategies for UAT, pilot agency active grant award data migration, and data integration*	3.2.4,3.2.5.3.2.6	SL,NV	no	1 day	8/13/2018	8/13/2018	
168	*3.2.11.8*	*Testing scenarios for UAT, pilot agency active grant award data migration, and data integration*	3.2.4,3.2.5.3.2.6	SL,NV	no	1 day	8/13/2018	8/13/2018	
169	*3.2.11.9*	*Testing master plan and schedules for UAT, pilot agency active grant award data migration testing, and data integration testing*	3.2.4,3.2.5.3.2.6	SL,NV	no	1 day	8/13/2018	8/13/2018	
170	*3.2.11.10*	*Training material drafts*	3.2.8	SL	no	1 day	8/13/2018	8/13/2018	
171	**3.3**	**Post-Grant Testing**	3.2	SL,NV	no	16 days	8/14/2018	8/29/2018	
172	3.3.1	Manage, track, execute, and document UAT, pilot agency active grant award data, and data integration testing	3.2.11.9	SL,NV	YES	10 days	8/14/2018	8/23/2018	occurs concurrently
173	3.3.2	Develop, update, and maintain migration checklist	3.3.1	SL	no	5 days	8/19/2018	8/23/2018	occurs concurrently
174	3.3.3	Prepare for configuration and data migration to Production site	3.3.2	SL	no	3 days	8/24/2018	8/26/2018	occurs concurrently
175	3.3.4	Conduct train-the-trainer sessions	3.2.11.10	SL,NV	YES	3 days	8/24/2018	8/26/2018	occurs concurrently

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
176	3.3.5	Execute communication plan tasks	3.3.4	SL,NV	no	2 days	8/27/2018	8/28/2018	occurs concurrently
177	3.3.6	Execute knowledge transfer plan tasks	3.3.5	SL,NV	no	2 days	8/27/2018	8/28/2018	occurs concurrently
178	*3.3.7*	*Deliverables (Testing)*	n/a	SL,NV	no	1 day	8/29/2018	8/29/2018	
179	*3.3.7.1*	*UAT, pilot agency active grant data migration, and data integration results*	3.3.1	SL,NV	YES	1 day	8/29/2018	8/29/2018	
180	*3.3.7.2*	*Training materials*	3.2.11.10	SL	no	1 day	8/29/2018	8/29/2018	
181	*3.3.7.3*	*Train-the-trainer sessions*	3.3.4	SL,NV	YES	1 day	8/29/2018	8/29/2018	
182	**3.4**	**Post-Grant Migration**	3.3	SL,NV	no	6 days	8/30/2018	9/4/2018	
183	3.4.1	Complete configuration migration tasks	3.3.3	SL	no	3 days	8/30/2018	9/1/2018	occurs concurrently
184	3.4.2	Complete data migration tasks	3.3.2	SL	no	3 days	8/30/2018	9/1/2018	occurs concurrently
185	3.4.3	Execute communication plan tasks	3.4.2	SL,NV	no	2 days	9/2/2018	9/3/2018	occurs concurrently
186	3.4.4	Execute knowledge transfer plan tasks	3.4.3	SL,NV	no	2 days	9/2/2018	9/3/2018	occurs concurrently
187	*3.4.5*	*Deliverables (Migration)*	n/a	SL	no	1 day	9/4/2018	9/4/2018	
188	*3.4.5.1*	*Configuration migration checklist*	3.4.1	SL	no	1 day	9/4/2018	9/4/2018	
189	*3.4.5.2*	*Data migration checklist*	3.4.2	SL	no	1 day	9/4/2018	9/4/2018	
190	**3.5**	**Post-Grant Go-Live**	3.4	SL,NV	no	56 days	9/5/2018	10/30/2018	
191	3.5.1	Complete production go-live readiness tasks for pilot agencies	3.4.4	SL,NV	no	2 days	9/5/2018	9/6/2018	
192	3.5.2	Confirm that deployment to production site is complete	3.4.2	SL,NV	no	1 day	9/7/2018	9/7/2018	
193	3.5.3	Conduct pilot agency end user training via Train the Trainer approach	3.5.2	SL,NV	no	3 days	9/8/2018	9/9/2010	occurs concurrently
194	3.5.4	Management of pilot agency grant awards (Deliverable 4.7.3.2)	3.5.3	SL,NV	YES	15 days	9/10/2018	9/24/2018	
195	3.5.5	Schedule reporting requirements for internal metrics and goals (Deliverable 4.7.3.3)	3.5.4	SL,NV	no	10 days	9/25/2018	10/4/2018	
196	3.5.6	Enchanced administration and reduced audit findings (Deliverable 4.7.3.4)	3.5.5	SL,NV	no	10 days	10/5/2018	10/14/2018	
197	3.5.7	All users for pilot grants master process (Deliverable 4.7.3.5)	3.5.6	SL,NV	YES	15 days	9/25/2018	10/9/2018	occurs concurrently
198	3.5.8	Adoption of any necessary revisions and acceptance (Deliverable 4.7.3.6)	3.5.7	SL,NV	YES	5 days	10/10/2018	10/19/2018	
199	3.5.9	Complete Post-Grant Pilot Evaluation Review	3.5.8	SL,NV	no	3 days	10/19/2018	10/21/2018	
200	3.5.10	Transition pilot users to post implementation support for Post-Grant	3.5.8	SL,NV	no	5 days	10/20/2018	10/24/2018	occurs concurrently
201	3.5.11	Finalize project documents	3.5.10	SL	no	3 days	10/22/2018	10/24/2018	occurs concurrently
202	3.5.12	Conduct knowledge transfer sessions	3.5.11	SL,NV	no	3 days	10/25/2018	10/27/2018	
203	3.5.13	Complete transition plan tasks	3.5.12	SL,NV	no	2 days	10/28/2018	10/29/2018	
204	3.5.14	Post-Grant Enterprise Roll-out Go Live	3.5.13	SL,NV	no	1 day	see narrative	see narrative	
205	*3.5.15*	*Deliverables (Go-Live)*	n/a	SL,NV	no	1 day	10/30/2018	10/30/2018	
206	*3.5.15.1*	*Go-live pilot readiness and production deployment checklist*	3.5.1	SL	no	1 day	10/30/2018	10/30/2018	
207	*3.5.15.2*	*Configured production environment*	3.5.2	SL	no	1 day	10/30/2018	10/30/2018	
208	*3.5.15.3*	*Pilot agency end user training sessions*	3.5.3	SL,NV	no	1 day	10/30/2018	10/30/2018	
209	*3.5.15.4*	*Final training materials*	3.5.2	SL	no	1 day	10/30/2018	10/30/2018	
210	*3.5.15.5*	*Final knowledge transfer plan*	3.5.12	SL	no	1 day	10/30/2018	10/30/2018	
211	*3.5.15.6*	*Final enhancement tracking log*	3.5.8	SL	no	1 day	10/30/2018	10/30/2018	
212	*3.5.15.7*	*Final issue tracking log*	3.5.8	SL	no	1 day	10/30/2018	10/30/2018	
213	*3.5.15.8*	*Final configuration documents*	3.5.8	SL	no	1 day	10/30/2018	10/30/2018	
214	*3.5.15.9*	*Final integration documents*	3.5.8	SL	no	1 day	10/30/2018	10/30/2018	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
215	*3.5.15.10*	*Final test cases (UAT, pilot agency active grant award data, and data integration) with testing results*	3.5.8	SL	no	1 day	10/30/2018	10/30/2018	
216	*3.5.15.11*	*Knowledge transfer sessions*	3.5.12	SL,NV	no	1 day	10/30/2018	10/30/2018	
217	*3.5.15.12*	*Transition plan*	3.5.13	SL	no	1 day	10/30/2018	10/30/2018	
218	*3.5.15.13*	*Post Pilot Post-Grant Evaluation Report*	3.5.13	SL,NV	no	1 day	10/30/2018	10/30/2018	
219	**4**	**Sub-Recipient Setup (Scope of Work 4.8)**	1.3	SL,NV	no	245 days	12/1/2017	8/2/2018	Configuration, Testing and Migration occur during application solicitation phase. Sub-Recipient and Applicant Go-Live dates reflect the point in time which said users would be accessing the system to manage their application and/or
220	**4.1**	**Sub-Recipient Analysis**	1.3	SL,NV	no	38 days	12/1/2017	1/7/2018	
221	4.1.1	Conduct business process and gap analysis workshops	1.3	SL,NV	no	3 days	12/1/2017	12/3/2017	
222	4.1.2	Document workshop findings	4.1.1	SL	no	2 days	12/4/2017	12/5/2017	
223	4.1.3	Document scope changes (if applicable)	4.1.2	SL	no	5 days	12/6/2017	12/10/2017	
224	4.1.4	Define System Configuration of AmpliFund Master Data Elements	4.1.3	SL,NV	no	3 days	12/11/2017	12/13/2017	
225	4.1.5	Define User Roles and Security	4.1.4	SL,NV	no	3 days	12/14/2017	12/16/2017	
226	4.1.6	Define Module Configuration	4.1.5	SL,NV	no	3 days	12/17/2017	12/19/2017	
227	4.1.7	Define Workflow Configuration	4.1.6	SL,NV	no	5 days	12/20/2017	12/24/2017	
228	4.1.8	Begin drafting configuration documents	4.1.7	SL	no	3 days	12/26/2017	12/28/2017	
229	4.1.9	Develop training strategy	4.1.7	SL	no	3 days	12/29/2017	12/31/2017	
230	4.1.10	Develop knowledge transfer plan	4.1.9	SL	no	3 days	1/2/2018	1/4/2018	
231	4.1.11	Execute communication plan tasks	4.1.10	SL,NV	no	2 days	1/5/2018	1/6/2018	
232	*4.1.12*	*Deliverables (Analysis)*	n/a	SL	no	1 day	1/7/2018	1/7/2018	
233	*4.1.12.1*	*Requirements and business process analysis plan*	4.1.3	SL	YES	1 day	1/7/2018	1/7/2018	
234	*4.1.12.2*	*Gap analysis*	4.1.3	SL	no	1 day	1/7/2018	1/7/2018	
235	*4.1.12.3*	*Project scope revisions*	4.1.3	SL	no	1 day	1/7/2018	1/7/2018	
236	*4.1.12.4*	*Training strategy*	4.1.9	SL	no	1 day	1/7/2018	1/7/2018	
237	*4.1.12.5*	*Knowledge transfer plan*	4.1.10	SL	no	1 day	1/7/2018	1/7/2018	
238	**4.2**	**Sub-Recipient Configuration**	4.1	SL,NV	no	28 days	1/8/2018	2/4/2018	
239	4.2.1	Complete system configuration associated with relevant modules in test environment	4.1.7	SL	no	5 days	1/8/2017	1/12/2018	
240	4.2.2	Develop UAT strategy, scenarios, and schedule	4.2.1	SL	no	8 days	1/13/2018	1/20/2018	
241	4.2.3	Create testing master plan and schedules	4.2.2	SL	no	3 days	1/21/2018	1/23/2018	
242	4.2.4	Design training curriculum and materials	4.1.12.4	SL	no	2 days	1/24/2018	1/25/2018	
243	4.2.5	Reduction and simplicity of document library (Deliverable 4.8.3.1)	4.2.1	SL,NV	no	5 days	1/26/2018	1/30/2018	
244	4.2.6	Solicitation library complete (Deliverable 4.8.3.2)	4.2.1	SL,NV	no	5 days	1/26/2018	1/30/2018	
245	4.2.7	Execute communication plan tasks	4.2.6	SL,NV	no	2 days	1/31/2018	2/1/2018	
246	4.2.8	Execute knowledge transfer plan tasks	4.2.7	SL,NV	no	2 days	2/2/2018	2/3/2018	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
247	*4.2.9*	*Deliverables (Configuration)*	n/a	SL	no	1 day	2/4/2018	2/4/2018	
248	*4.2.9.1*	*Configuration documents*	4.2.1	SL	no	1 day	2/4/2018	2/4/2018	
249	*4.2.9.2*	*Configured test environment*	4.2.1	SL	no	1 day	2/4/2018	2/4/2018	
250	*4.2.9.3*	*Testing strategies, scenarios, and schedules for UAT*	4.2.2	SL	no	1 day	2/4/2018	2/4/2018	
251	*4.2.9.4*	*Training material drafts*	4.2.4	SL	no	1 day	2/4/2018	2/4/2018	
252	**4.3**	**Sub-Recipient Testing**	4.2	SL,NV	no	21 days	2/5/2018	2/25/2018	
253	4.3.1	Conduct testing of functional enhancements	4.2.9.3	SL	no	3 days	2/5/2018	2/7/2018	
254	4.3.2	Manage, track, execute, and document UAT	4.3.2	SL	YES	10 days	2/8/2018	2/17/2018	
255	4.3.3	Conduct train-the-trainer sessions	4.2.9.4	SL,NV	YES	3 days	2/18/2018	2/20/2018	
256	4.3.4	Execute communication plan tasks	4.3.3	SL,NV	no	2 days	2/21/2018	2/22/2018	
257	4.3.5	Execute knowledge transfer plan tasks	4.3.4	SL,NV	no	2 days	2/23/2018	2/24/2018	
258	*4.3.6*	*Deliverables (Testing)*	n/a	SL	no	1 day	2/25/2018	2/25/2018	
259	*4.3.6.1*	*UAT results*	4.3.2	SL	YES	1 day	2/25/2018	2/25/2018	
260	*4.3.6.2*	*Training materials*	4.2.9.4	SL	no	1 day	2/25/2018	2/25/2018	
261	*4.3.6.3*	*Train-the-trainer sessions*	4.3.3	SL,NV	YES	1 day	2/25/2018	2/25/2018	
262	**4.4**	**Sub-Recipient Migration**	4.3	SL,NV	no	11 days	2/26/2018	3/8/2018	
263	4.4.1	Complete configuration migration tasks	4.3.6.1	SL	no	3 days	2/26/2018	2/28/2018	
264	4.4.2	Complete data migration tasks	4.4.1	SL	no	3 days	3/1/2018	3/3/2018	
265	4.4.3	Execute communication plan tasks	4.4.2	SL,NV	no	2 days	3/4/2018	3/5/2018	
266	4.4.4	Execute knowledge transfer plan tasks	4.4.3	SL,NV	no	2 days	3/6/2018	3/7/2018	
267	*4.4.5*	*Deliverables (Migration)*	n/a	n/a	no	1 day	3/8/2018	3/8/2018	
268	*4.4.5.1*	*Configuration migration checklist*	4.4.1	SL	no	1 day	3/8/2018	3/8/2018	
269	*4.4.5.2*	*Data migration checklist*	4.4.2	SL	no	1 day	3/8/2018	3/8/2018	
270	*4.4.5.3*	*Complete configuration migration checklist*	4.4.5.1	SL	no	1 day	3/8/2018	3/8/2018	
271	*4.4.5.4*	*Complete data migration checklist*	4.4.5.2	SL	no	1 day	3/8/2018	3/8/2018	
272	**4.5**	**Sub-Recipient Go-Live**	n/a	SL,NV	no	63 days	6/1/2018	8/2/2018	
273	4.5.1	Complete production go-live readiness tasks	4.4	SL,NV	no	2 days	6/1/2018	6/2/2018	
274	4.5.2	Confirm that deployment to production site is complete	4.5.1	SL,NV	no	1 day	6/3/2018	6/3/2018	
275	4.5.3	Conduct end user training via the Train the Trainer approach	4.5.2	SL,NV	no	3 days	6/4/2018	6/6/2018	
276	4.5.4	Adoptions of any necessary revisions and acceptance (Deliverable 4.8.3.6)	4.5.3	SL,NV	YES	5 days	6/16/2018	6/20/2018	
277	4.5.5	Enhanced administration and reduced audit findings (Deliverable 4.8.3.4)	4.5.4	SL,NV	no	10 days	6/21/2018	6/30/2018	
278	4.5.6	Sub-recipient access to portal (Deliverable 4.8.3.3)	4.5.5	SL,NV	YES	1 day	7/1/2018	7/1/2018	
279	4.5.7	All users master the process (Deliverable 4.8.3.5)	4.5.6	SL,NV	YES	15 days	7/2/2018	7/16/2018	
280	4.5.8	Finalize project documents	4.5.7	SL	no	3 days	7/17/2018	7/19/2018	
281	4.5.9	Conduct knowledge transfer sessions	4.5.8	SL,NV	no	2 days	7/20/2018	7/21/2018	
282	4.5.10	Complete transition plan tasks	4.5.8	SL,NV	no	2 days	7/22/2018	7/23/2018	
283	4.5.11	Post Sub-Recipient Implementation Evaluation Overview	4.5.10	SL,NV	no	3 days	7/24/2018	7/26/2018	
284	4.5.13	Transition users to post implementation support for Sub-Recipient	4.5.7	SL,NV	no	5 days	7/27/2018	8/1/2018	
285	*4.5.14*	*Deliverables (Go-Live)*	n/a	SL,NV	no	1 day	8/2/2018	8/2/2018	
286	*4.5.14.1*	*Go-live readiness and production deployment checklist*	4.5.1	SL	no	1 day	8/2/2018	8/2/2018	

ID	WBS	Task Name	Dependencies	Resource	Milestone	Duration	Start Date	End Date	Comments
287	*4.5.14.2*	*Configured production environment*	4.5.2	SL	no	1 day	8/2/2018	8/2/2018	
288	*4.5.14.3*	*Final training materials*	4.5.2	SL	no	1 day	8/2/2018	8/2/2018	
289	*4.5.14.4*	*Final knowledge transfer plan*	4.5.9	SL	no	1 day	8/2/2018	8/2/2018	
290	*4.5.14.5*	*Final configuration documents*	4.5.4	SL	no	1 day	8/2/2018	8/2/2018	
291	*4.5.14.6*	*Knowledge transfer sessions*	4.5.14.4	SL,NV	no	1 day	8/2/2018	8/2/2018	
292	*4.5.14.7*	*Transition plan*	4.5.10	SL,NV	no	1 day	8/2/2018	8/2/2018	
293	*4.5.14.8*	*Post Sub-Recipient Implementation Evaluation Report*	4.5.11	SL,NV	no	1 day	8/2/2018	8/2/2018	
294	**5**	**On-Going Technical Support (Scope of Work 4.9)**	3,4,5	SL,NV	no	28 days	8/3/2018	8/30/2018	
295	**5.1**	**On-Going Technical Support**	3,4,5	SL,NV	no	15 days	8/3/2018	8/17/2018	
296	5.1.1	Transition to on-going support (online help desk)	3,4,5	SL,NV	YES	5 days	8/3/2018	8/7/2018	
297	5.1.5	Grant Management System allows access to all users 24 hour, 7 days a week (Deliverable 4.9.3.3)	3,4,5	SL,NV	no	0 days			
298	5.1.6	On-going access to best practice and industry standards (Deliverable 4.9.3.1)	5.1.5	SL,NV	no	0 days			
299	5.1.7	All questions and concerns answered (Deliverable 4.9.3.2)	5.1.5	SL,NV	no	0 days			
300	5.1.8	Finalize project documents	5.1.7	SL	no	3 days	8/7/2018	8/9/2018	
301	5.1.9	Conduct knowledge transfer sessions	5.1.8	SL,NV	no	3 days	8/10/2018	8/12/2018	
302	5.1.10	Revisions and upgrades accessed (Deliverable 4.9.3.4)	5.1.1	SL,NV	YES	0 days			
303	5.1.11	Post On-Going Technical Support Implementation Evaluation Review	5.1.9	SL,NV	no	5 days	8/13/2018	8/17/2018	
304	**6.1**	**Project Completion**	5	SL,NV	no	13 days	8/18/2018	8/30/2018	
305	6.1.1	Complete project close-out tasks and report	5.1.11	SL,NV	no	5 days	8/18/2018	8/22/2018	
306	6.1.2	Secure final client sign-off	6.1.2	NV	YES	1 day	8/23/2018	8/23/2018	
307	6.1.3	Transition client to post implementation support	6.1.1	SL,NV	no	1 day	8/24/2018	8/24/2018	
308	6.1.4	Post Implementation Evaluation Review (Deliverable 4.4.3.8)	6.1.3	SL,NV	no	5 days	8/25/2018	8/29/2018	
309	*6.1.5*	*Deliverables (Go-Live)*	n/a	na/	no	1 day	8/30/2018	8/30/2018	
310	*6.1.5.1*	*Transition plan*	6.1.3	SL	no	1 day	8/30/2018	8/30/2018	
311	*6.1.5.2*	*Project close-out report*	6.1.1.	SL	no	1 day	8/30/2018	8/30/2018	
312	*6.1.5.3*	*Client project sign-off*	6.1.2	NV	YES	1 day	8/30/2018	8/30/2018	

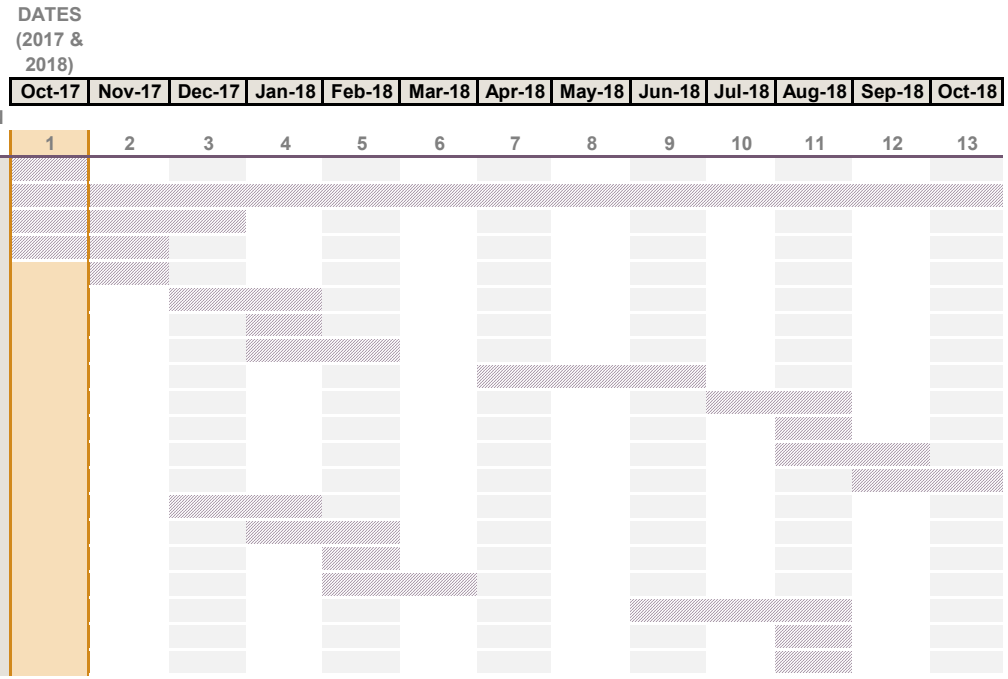
AmpliFund Implementation Project Plan

Period Highlight: 1

Plan

Note: For ease of viewing, the Gantt chart is collapsed from days to months to provide the State a high level overview

ACTIVITY	PLAN START	PLAN DURATION
1.1 Project Initiation: Project Kick-Off Meeting (Scope of Work 4.3)	1	1
1.2 Project Planning: Planning and Administration (Scope of Work 4.4)	1	13
1.3 Project Analysis: Change Management Plan (Scope of Work 4.5)	1	3
2.1 Pre-Grant Analysis	1	2
2.2 Pre-Grant Configuration	2	1
2.3 Pre-Grant Testing	3	2
2.4 Pre-Grant Migration	4	1
2.5 Pre-Grant Go-Live	4	2
3.1 Post-Grant Analysis	7	3
3.2 Post-Grant Configuration	10	2
3.3 Post-Grant Testing	11	1
3.4 Post-Grant Migration	11	2
3.5 Post-Grant Go-Live	12	2
4.1 Sub-Recipient Analysis	3	2
4.2 Sub-Recipient Configuration	4	2
4.3 Sub-Recipient Testing	5	1
4.4 Sub-Recipient Migration	5	2
4.5 Sub-Recipient Go-Live	9	3
5.1 On-Going Technical Support	11	1
6.1 Project Completion	11	1



Section X – Other Informational Material

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Exhibit A – SOC III

The Microsoft Azure SOC III Audit Report is a protected document that cannot be combined into a PDF. This report has been attached separately.

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AmpliFund Security Roles

AmpliFund offers a variety of security roles so that you can ensure your users only see what they need to see. Some security roles may not be applicable to your organization based on your account subscription and modules.

Security Role	Description
Organizational Administrators	Organizational Administrators have the highest level of security and can create, view, and edit all records in the account, including Staff compensation information. Organizational Administrators are the only users that can create, view, and edit records in the Administration module. The Administration module includes License Information, Account Settings, Lead and Sub-Recipients* management, Workflow* management, System Security and user management, and Lists and Actuals management and import. There is no limit to the number of Organizational Administrators you can have per account.
Executives	Executives can view all records in the account, including Staff compensation information, but cannot add or edit any records. Executive users can also view the License Information section in the Administration module.
Department Administrators	Department Administrators can create, view, and edit all grant and project* records linked to their department(s).
Department Users	Department Users can add achievements and expenses that are assigned to them. In addition, they can view all grant and project* records linked to their department(s). Department Users are classified as Salary or No Salary. Department Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Project Administrators	Project Administrators can create, view, and edit all project* records. In addition, Project Administrators can view all grants related to their projects.
Project Users	Project Users can add achievements and expenses assigned to them and can view and edit all projects* assigned to them. They can also view any grants linked to their projects. Project Users can create new projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.
Fund Administrators	Fund Administrators can create, view, and edit all fund*, opportunity*, and award* records.
Fund Users	Fund Users can view and edit any assigned fund* records. Fund Users can create new fund records. They can also create, view, and edit all opportunity* and award* records. Fund Users are classified as Salary or No Salary. If assigned to a grant, Fund Users (No Salary) cannot create, view, or edit personnel line items on a grant's budget.

*Add-on module

Implicit Security Roles

If users are designated as a record's manager (i.e. Grant Managers, Project Managers, or Fund Managers), they will have additional security privileges on those records. They will be able to view all calendar items related to the record, and view and edit the record. (No Salary) users will still not be able to see the personnel line items.

AmpliFund Security Roles Matrix

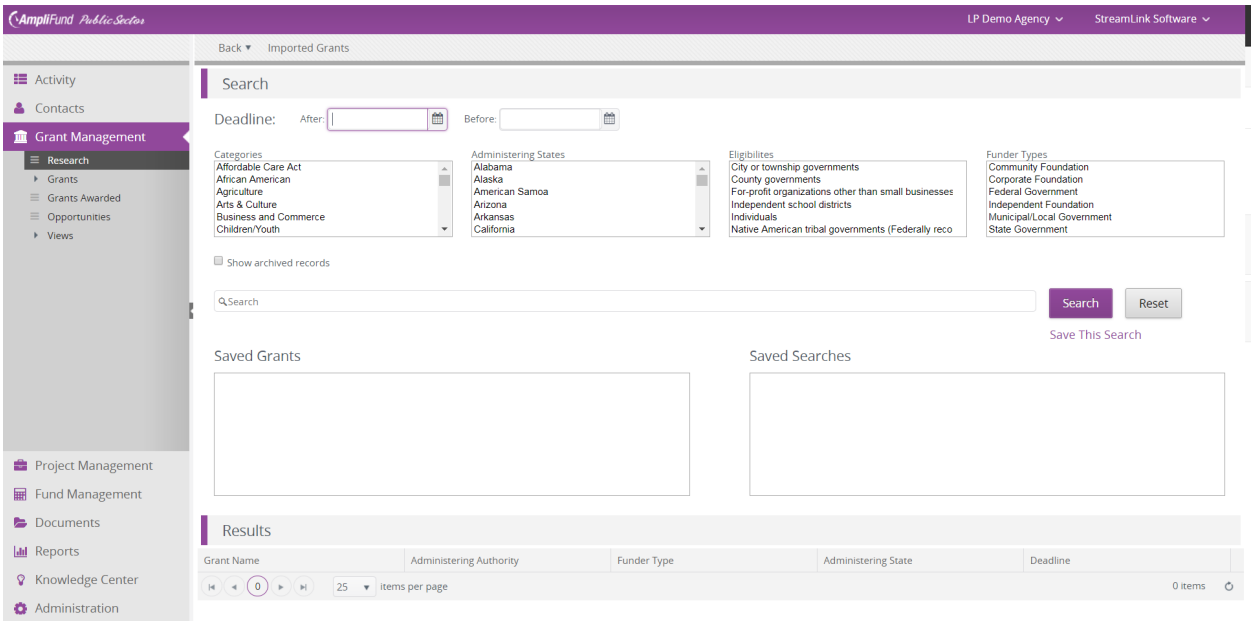
This matrix is a comprehensive reference of AmpliFund security roles access. The security roles are listed at the top of each column and AmpliFund pages are listed to the left of the rows. Users can view only their assigned items unless otherwise designated by *all* or *linked*. *All* indicates that the user can see all items in the account; *linked* indicates that the user can see all items linked to their department, project, or fund. A grayed-out box with no text indicates that the user will not have access. Light blue rows, also designated with an asterisk (*), show add-on modules.

	Organizational Admin	Executive	Department Admin	Department User (Salary)	Department User (No Salary)	Project Admin	Project User (Salary)	Project User (No Salary)	Fund Admin	Fund User (Salary)	Fund User (No Salary)
Activity											
Calendar	View all	View all	View linked	View	View	View linked	View	View	View linked	View	View
Message Center	View	View	View	View	View	View	View	View	View	View	View
Events	View all	View all	View linked	View	View	View	View	View	View	View	View
Tasks	View all	View	View linked	View	View	View	View	View	View	View	View
Workflow*	View	View	View	View	View	View	View	View	View	View	View
Achievements	Create Edit View all	View all	Create Edit View linked	Create Edit View	Create Edit View	Create Edit View	Create Edit View	Create Edit View			
Expenses	Create Edit View all	View all	Create Edit View linked	Create Edit View	Create Edit View	Create Edit View	Create Edit View	Create Edit View			
Program Income	Edit View all	View all	Edit View all	Edit View all	Edit View all						
Timesheets*	Edit View	Edit View	Edit View	Edit View	Edit View	Edit View	Edit View	Edit View	Edit View	Edit View	Edit View
Tracking Interval Approvals	View all	View all	View	View	View	View	View	View	View	View	View
Contacts											
Organizations	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Individuals	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all

	Organizational Admin	Executive	Department Admin	Department User (Salary)	Department User (No Salary)	Project Admin	Project User (Salary)	Project User (No Salary)	Fund Admin	Fund User (Salary)	Fund User (No Salary)
Staff	Create Edit View all (and Salary)	View all (and Salary)	View all	View all	View all	View all	View all	View all	View all	View all	View all
Sub-Recipients*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Lead Recipients*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Federal Government	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
State Government	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Local Government	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Foundation	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Corporation	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Vendors	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Grant Management											
Research*	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
All Grants	Create Edit View all	View all	Create Edit View linked	Create Edit View linked	Create Edit View linked	View linked	View	View	View	View	View
Budget Personnel Line Items	Create Edit View all	View all	Create Edit View all	Create Edit View all		Create Edit View all	Create Edit View all		Create Edit View all	Create Edit View all	
Opportunities*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all

	Organizational Admin	Executive	Department Admin	Department User (Salary)	Department User (No Salary)	Project Admin	Project User (Salary)	Project User (No Salary)	Fund Admin	Fund User (Salary)	Fund User (No Salary)
Reports											
Pre-Award	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Post-Award	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Recipient*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Project*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Time & Effort*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Fund*	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Knowledge Center											
Grant Intelligence	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
News	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Forms and Tools	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Publications	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Webinars	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all	View all
Administration											
License Information	Create Edit View all	View all									
System Admin*	Create Edit View all										
System Security	Create Edit View all										
Lists	Create Edit View all										
Actuals	Create Edit View all										

Exhibit C - Product Screenshots



1. Grant Acquisition Provide Potential Grant Opportunities – In database?
Searchable database?
Project/Agency Goals & Metrics search?

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AmpliFund Public Sector

LP Demo Agency | StreamLink Software

Back

Back To Search Results

Adirondack Foundation: Christopher Emmet Hallowell Fund

Grant Information

Funding Authority	Adirondack Foundation
Grant Category	Children/Youth
Funder Type	Independent Foundation
Administering State	
Eligible Applicants	Individuals
Additional Eligibility Information	For families or individuals caring for severely ill children or young adults living in Essex,Clinton or Franklin counties of New York State. Funding amounts will be made by weighing the following criteria: family need, other extenuating financial circumstances and actual funding available through the Fund at the time of the request. Grants will be made for one year, but applicants may reapply annually for continued funding. Copies of expense receipts must be provided if applicable. Financial assistance given through the CEH Fund cannot be used for medical care or treatment. However, a brief note from a doctor or other relevant third party explaining the medical need is recommended. These funds are not a replacement for medical insurance or the costs associated with securing insurance.
CFDA Number	
Deadline	
Close Date Explanation	Rolling
Last Updated	6/7/2017
Description	The Christopher Emmet Hallowell (CEH) Fund is an endowment fund established to support families caring for severely ill children and young adults in the Adirondack region of New York State. The fund seeks to perpetuate Christopher's legacy by providing financial assistance to families for incidental and unexpected expenses while caring for a child or young adult with a severe illness, thus allowing family members to provide the same continuous love and support that so greatly impacted the quality of Christopher's life.
Program Link	https://www.adirondackfoundation.org/files/public/Grantmaking/CEHFundEligibilityBackground.pdf
Application Link	https://www.grantinterface.com/Home/Logon?urlkey=generousact
Award Ceiling	$2,500.00
Total Program Funding	
Matching Requirement	No

Contact Information

Grantor Contact Details	
Name	Andrea Grout
Telephone	518-523-9904

1. Grant Acquisition Provide Potential Grant Opportunities – Provide electronic summary of opportunity?

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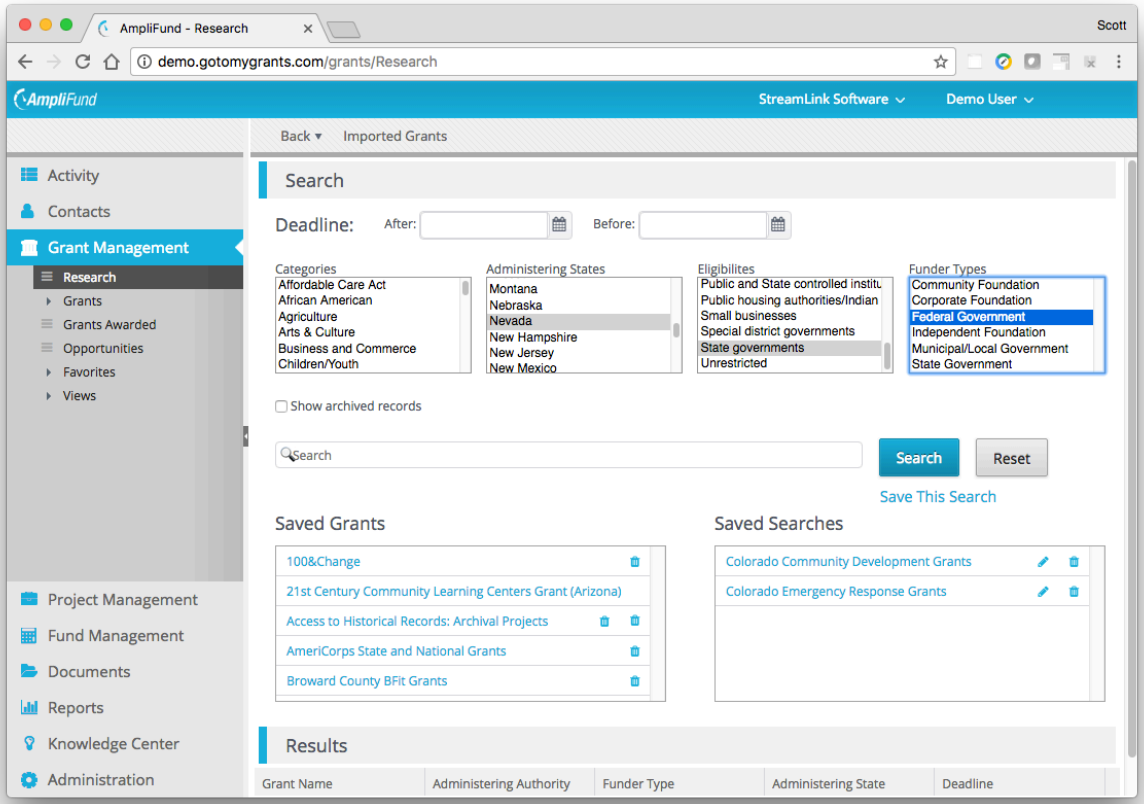

1. Grant Acquisition Provide Potential Grant Opportunities - Federal grants?

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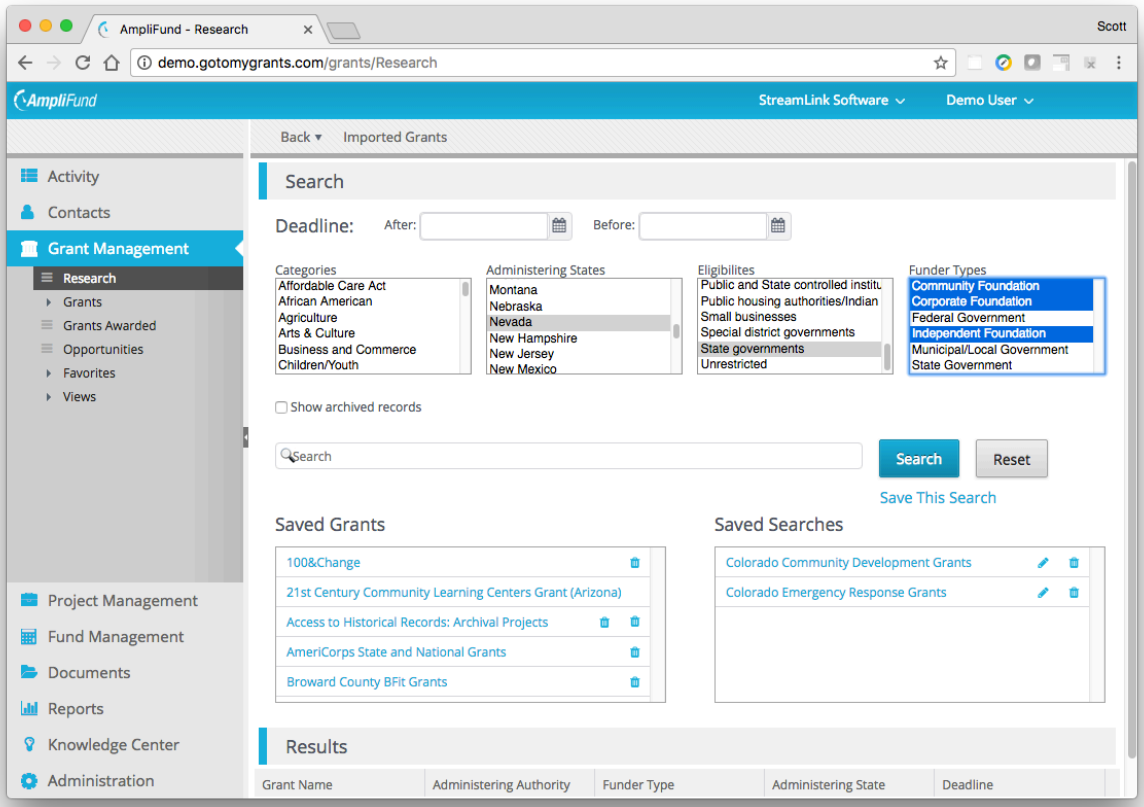

1. Grant Acquisition Provide Potential Grant Opportunities - Foundation grants?

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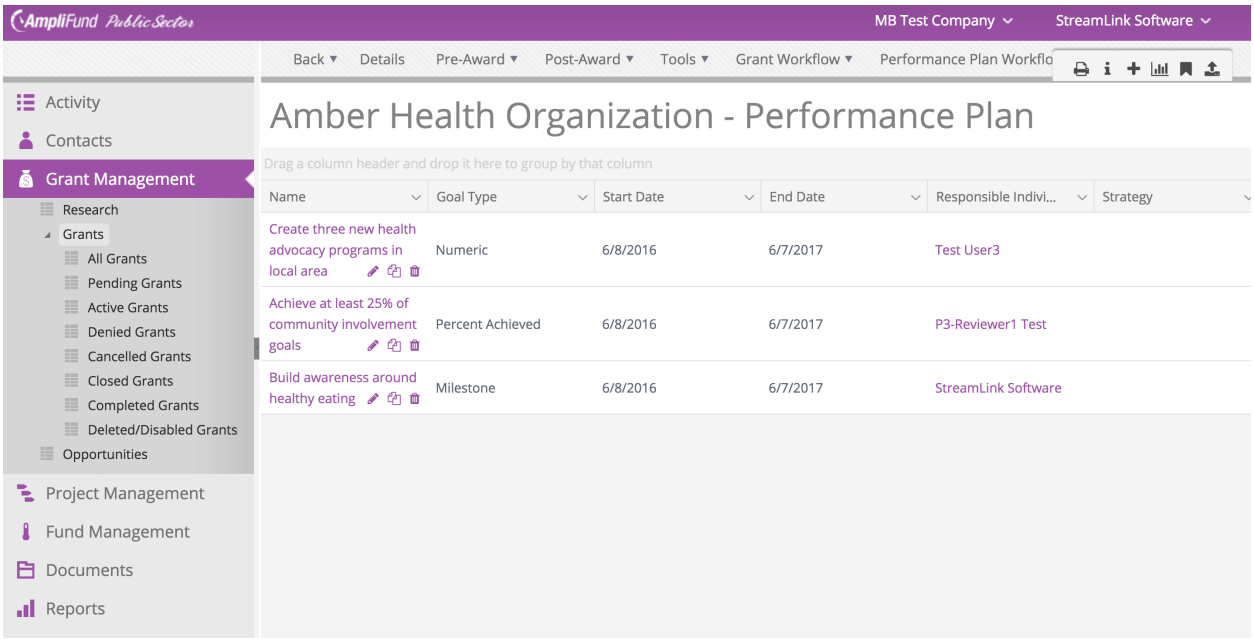

2. Grant Acquisition Provide Sharable Workspace and Workflow to Build Grant Application – Shared workspace?

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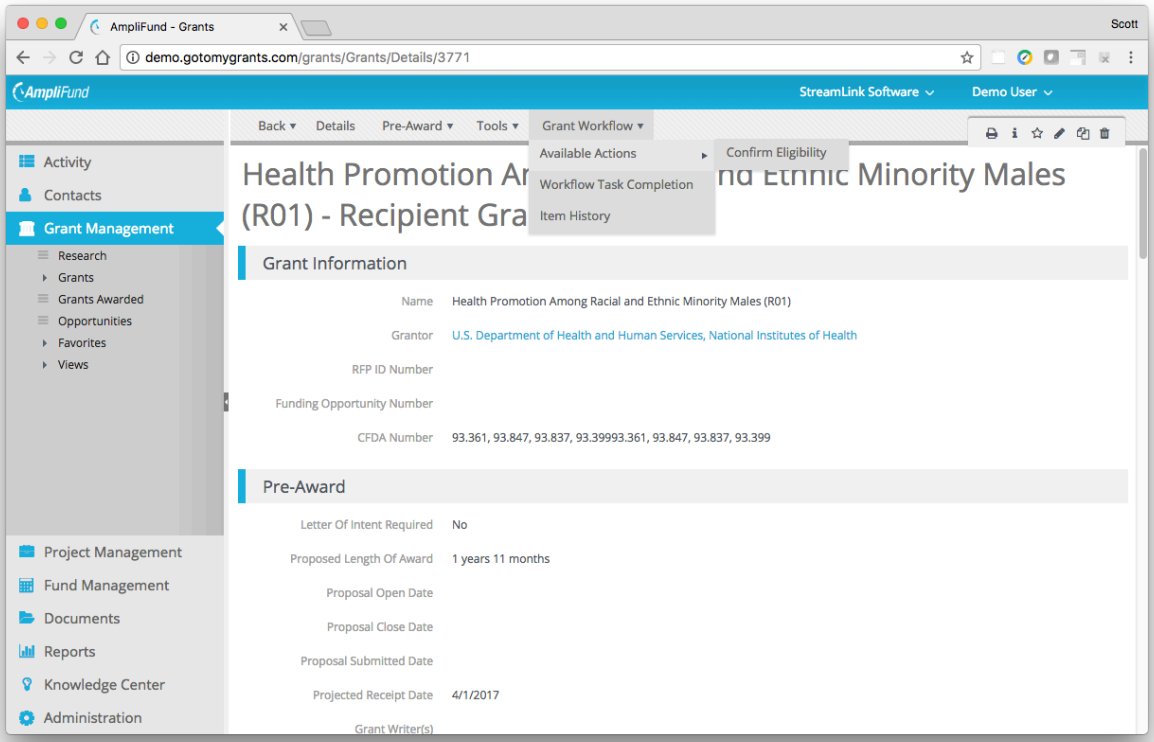

2. Grant Acquisition Provide Sharable Workspace and Workflow to Build Grant Application - Required workflow / approval?

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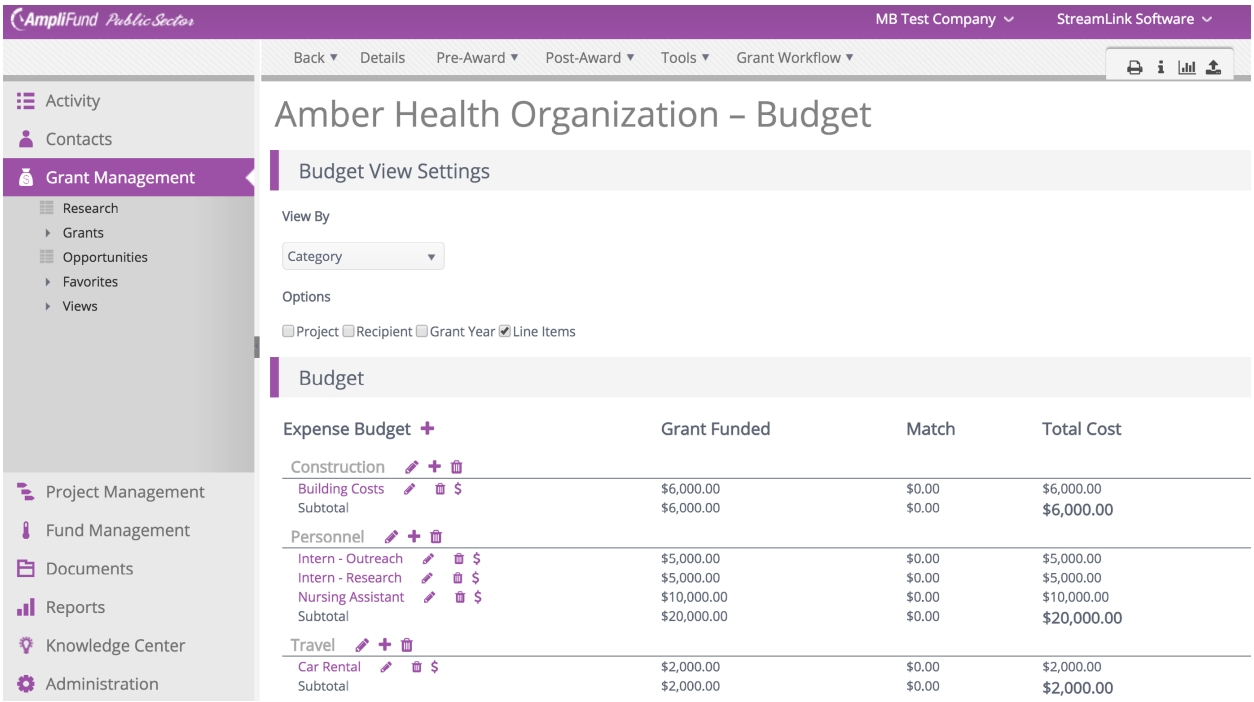

2. Grant Acquisition Provide Sharable Workspace and Workflow to Build Grant Application – Proposal budget development?

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Workflow History - Career Training for Community College Students

Drag a column header and drop it here to group by that column

Workflow Queue	Workflow Action	Text	User	Created Date
Identify/Review Opportunity	Move to Proposal Phase	'Career Training for Community College Students' (1) - Sent to Queue 'Create Proposal' (10)	support@streamlinksoftware.com	10/19/2016 4:08 PM
Create Proposal	Send Back to Review	'Career Training for Community College Students' (1) - Sent to Queue 'Identify/Review Opportunity' (9)	support@streamlinksoftware.com	10/19/2016 4:08 PM
Identify/Review Opportunity	Move to Proposal Phase	'Career Training for Community College Students' (1) - Sent to Queue 'Create Proposal' (10)	support@streamlinksoftware.com	11/23/2015 2:00 PM
Create Proposal	Send Back to Review	'Career Training for Community College Students' (1) - Sent to Queue 'Identify/Review Opportunity' (9)	support@streamlinksoftware.com	11/17/2015 11:28 AM
Identify/Review Opportunity	Move to Proposal Phase	'Career Training for Community College Students' (1) - Sent to Queue 'Create Proposal' (10)	support@streamlinksoftware.com	11/17/2015 11:23 AM
Identify/Review Opportunity	Add to Workflow	'Career Training for Community College Students' (1) - Added to Workflow Instance 'Global Grant Workflow' (4)	admin	7/22/2015 3:53 PM

2. Grant Acquisition Provide Sharable Workspace and Workflow to Build Grant Application – Track application development?

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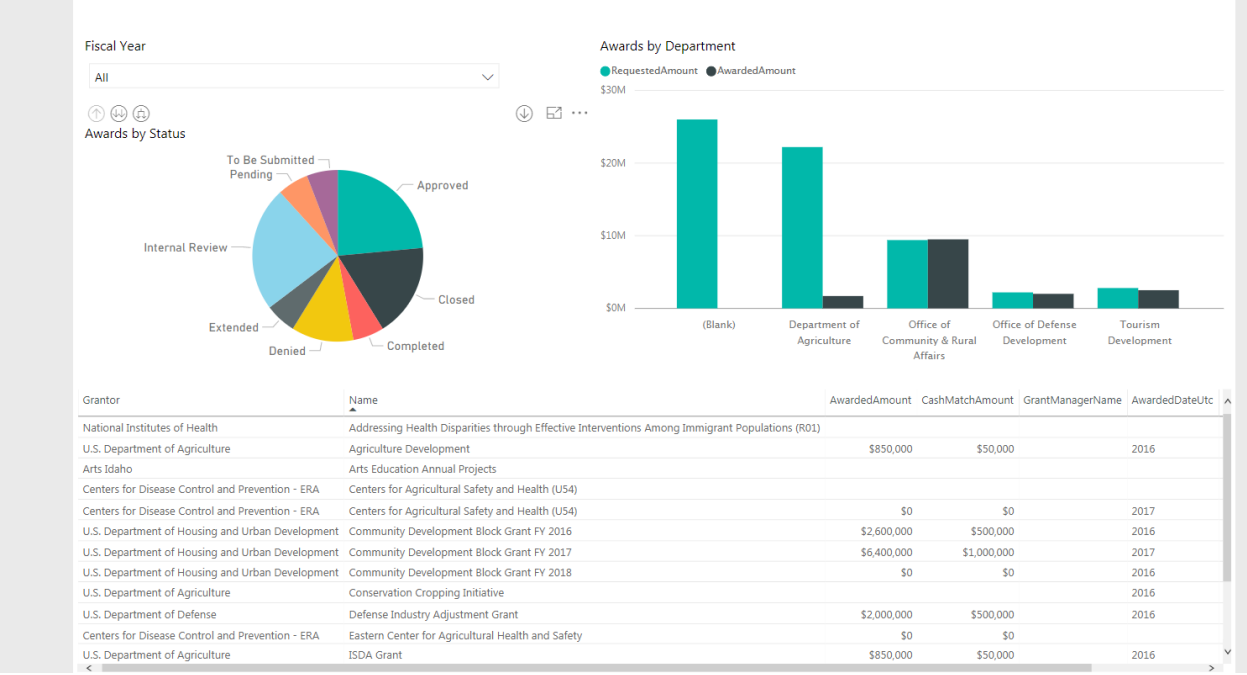

Grantor	Name	AwardedAmount	CashMatchAmount	GrantManagerName	AwardedDateUtc
National Institutes of Health	Addressing Health Disparities through Effective Interventions Among Immigrant Populations (R01)				
U.S. Department of Agriculture	Agriculture Development	$850,000	$50,000		2016
Arts Idaho	Arts Education Annual Projects				
Centers for Disease Control and Prevention - ERA	Centers for Agricultural Safety and Health (U54)				
Centers for Disease Control and Prevention - ERA	Centers for Agricultural Safety and Health (U54)	$0	$0		2017
U.S. Department of Housing and Urban Development	Community Development Block Grant FY 2016	$2,600,000	$500,000		2016
U.S. Department of Housing and Urban Development	Community Development Block Grant FY 2017	$6,400,000	$1,000,000		2017
U.S. Department of Housing and Urban Development	Community Development Block Grant FY 2018	$0	$0		2016
U.S. Department of Agriculture	Conservation Cropping Initiative				2016
U.S. Department of Defense	Defense Industry Adjustment Grant	$2,000,000	$500,000		2016
Centers for Disease Control and Prevention - ERA	Eastern Center for Agricultural Health and Safety	$0	$0		
U.S. Department of Agriculture	ISDA Grant	$850,000	$50,000		2016

2. Grant Acquisition Provide Sharable Workspace and Workflow to Build Grant Application – Submission-win rates?

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admin

Arizona Diabetes Education and Intervention

Print Help Save

Opportunity Information

Title	Arizona Diabetes Education and Intervention
Description	The Arizona Department of Health Services, Bureau of Tobacco and Chronic Disease will utilize a coordinated approach to address and respond to chronic diseases concerns in Arizona. This Request for Grant Application is pursuing organizations that will provide Diabetes Prevention services among high risk women, children and vulnerable communities in Yuma County and the State of Arizona. The Program Goal is to decrease populations that are disproportionately impacted by diabetes in disparate communities in Yuma County.
Fund Activity Category	Agriculture
Category Explanation	
Opportunity Manager	StreamLink Software
Posted Date	4/1/2016
Archive Date	7/31/2017
Funding Opportunity Number	ADHS16-00005596
CFDA Number	
Public Link	http://demo.gotomygrants.com/public/opportunities/details/1ed8a19b-3c94-48af-9915-7b5c44785b95
Is Published	Yes

Funding Information

3. Grant Solicitation For Federal pass-thru or State Funds Published to a public portal for application – Create a state-level grant solicitation?

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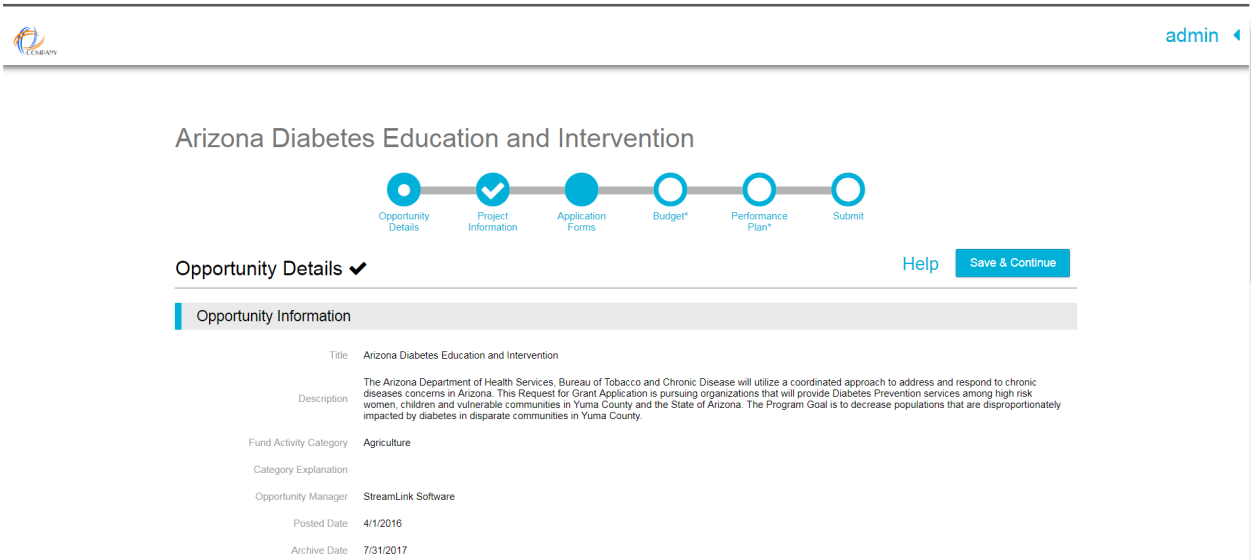

3. Grant Solicitation For Federal pass-thru or State Funds Published to a public portal for application – Portal for sub-recipients to submit application?

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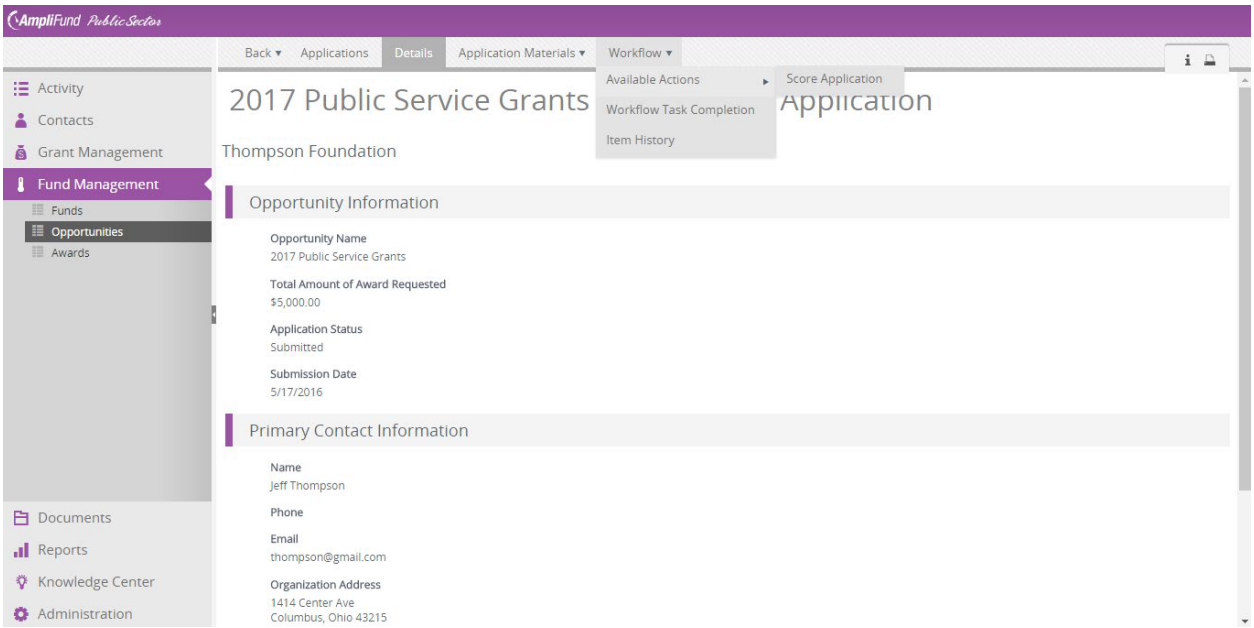

3. Grant Solicitation For Federal pass-thru or State Funds Published to a public portal for application – Portal for sub-recipient application evaluation?

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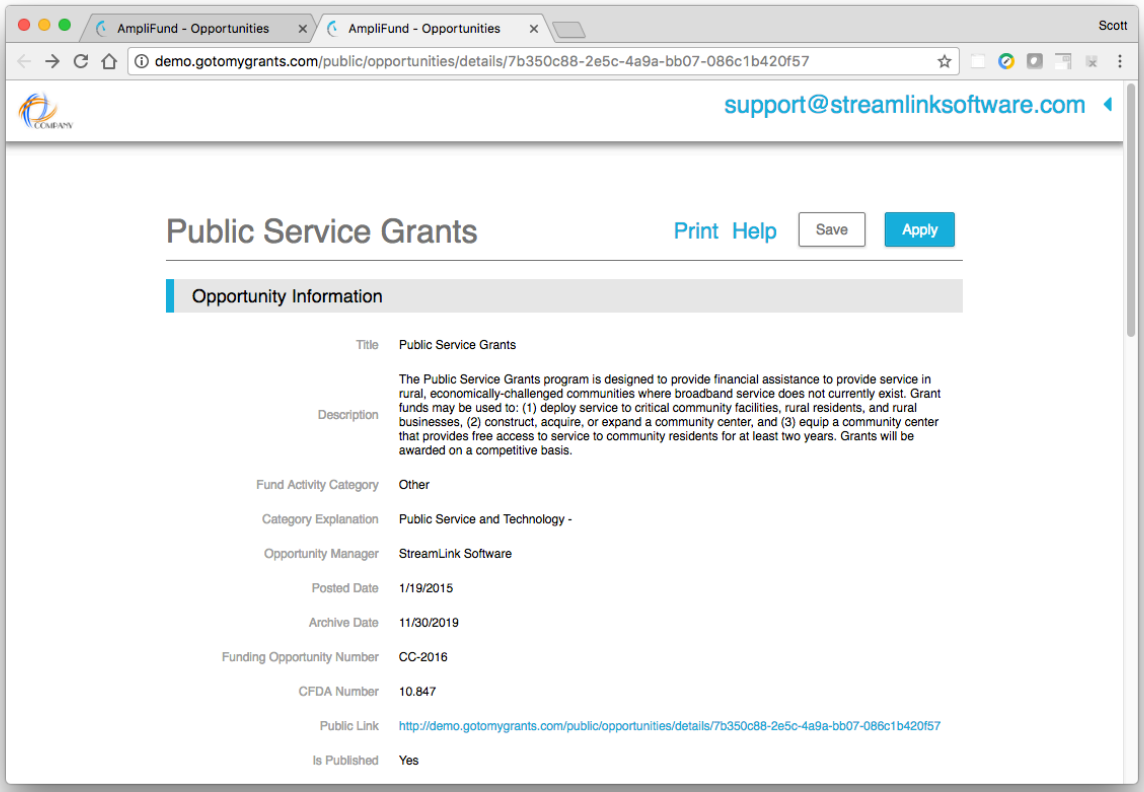

3. Grant Solicitation For Federal pass-thru or State Funds Published to a public portal for application - Portal for sub-recipient grant award?

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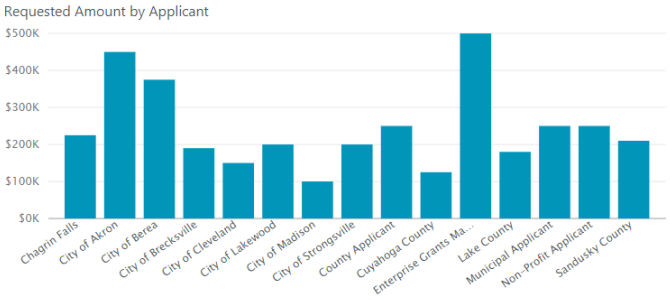
Opportunity

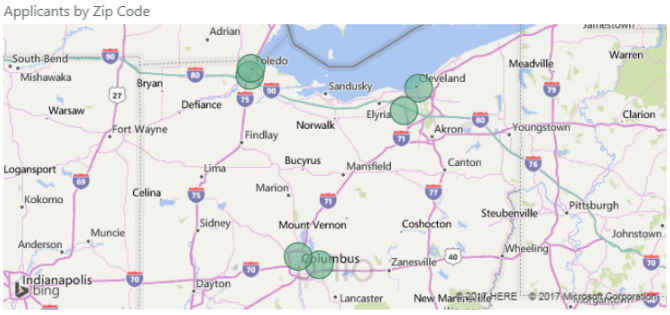
Blight Clearance Program

Estimated Funding	Total Requested	Average Requested
$6.40M	$3.65M	$228.44K

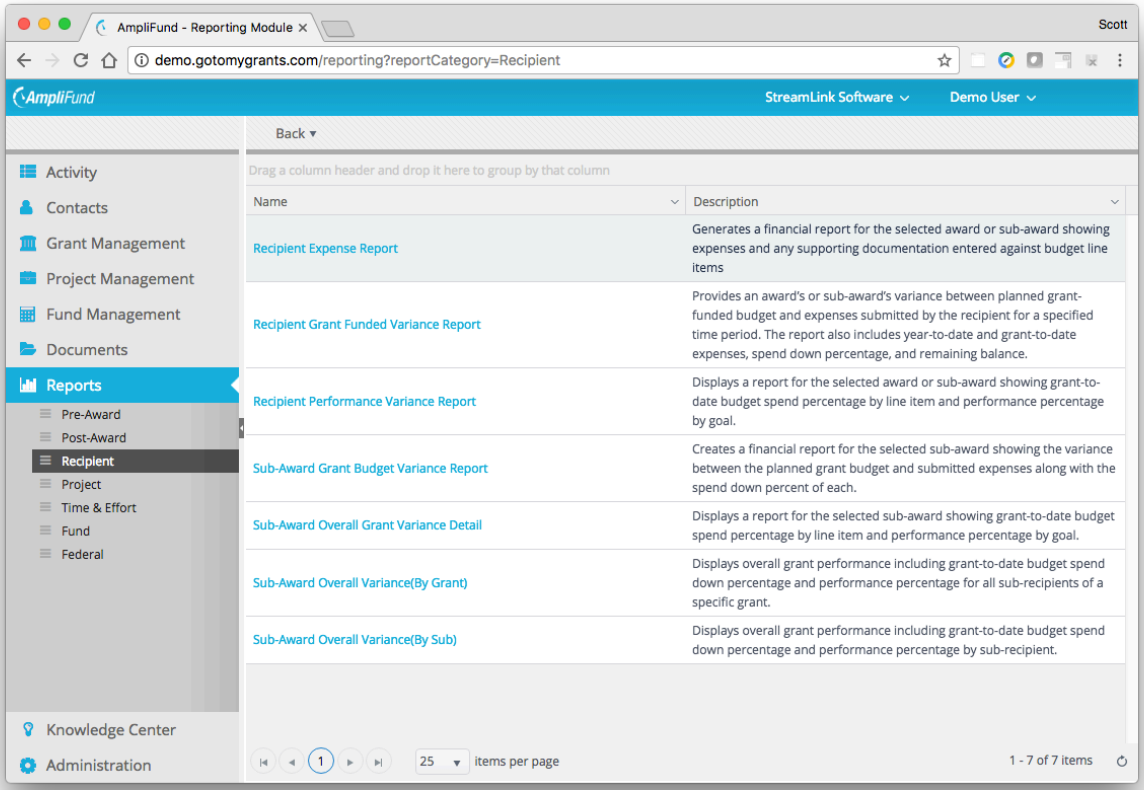
Submitted	Pending	Total
13	4	17



ApplicantOrganization	ProjectName	TotalAmountOfAwardRequested
City of Akron	Blight Clearance Program	$450,000.00
City of Madison	Blight Clearance Program	$100,000.00
Enterprise Grants Management	Blight Clearance Program	$500,000.00
County Applicant	County Applicant Application	$250,000.00
City of Berea	FY 2017 City Application 2	$200,000.00
Municipal Applicant	FY 2017 Municipal Applicant Application	$250,000.00
Chagrin Falls	FY2017 Chagrin Falls Application	$225,000.00
City of Berea	FY2017 City of Berea Application	$175,000.00
City of Brecksville	FY2017 City of Brecksville Application	$190,000.00
City of Cleveland	FY2017 City of Cleveland Application	$150,000.00
City of Lakewood	FY2017 City of Lakewood Application	$200,000.00
City of Strongsville	FY2017 City of Strongsville Application	$200,000.00
Cuyahoga County	FY2017 Cuyahoga County Application	$125,000.00
Lake County	FY2017 Lake Couny Application	$180,000.00
Non-Profit Applicant	FY2017 Non-Profit Application	$250,000.00
Sandusky County	FY2017 Sandusky County Application	$210,000.00



3. Grant Solicitation For Federal pass-thru or State Funds Published to a public portal for application – Provide data regarding submission of awards?



4 Sub-grant Recipients and Award - Task and deliverable tracking? **Recipient reports.**

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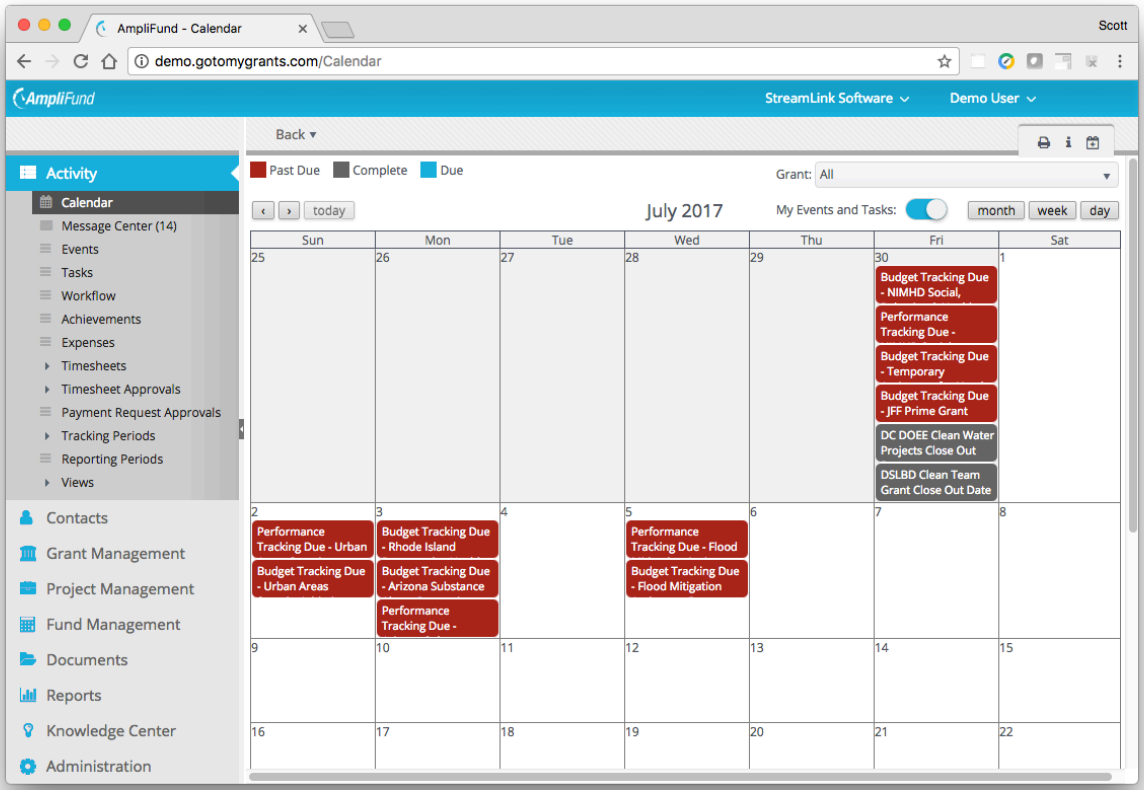

4 Sub-grant Recipients and Award - Task and deliverable tracking? **Tasks Published to calendar**

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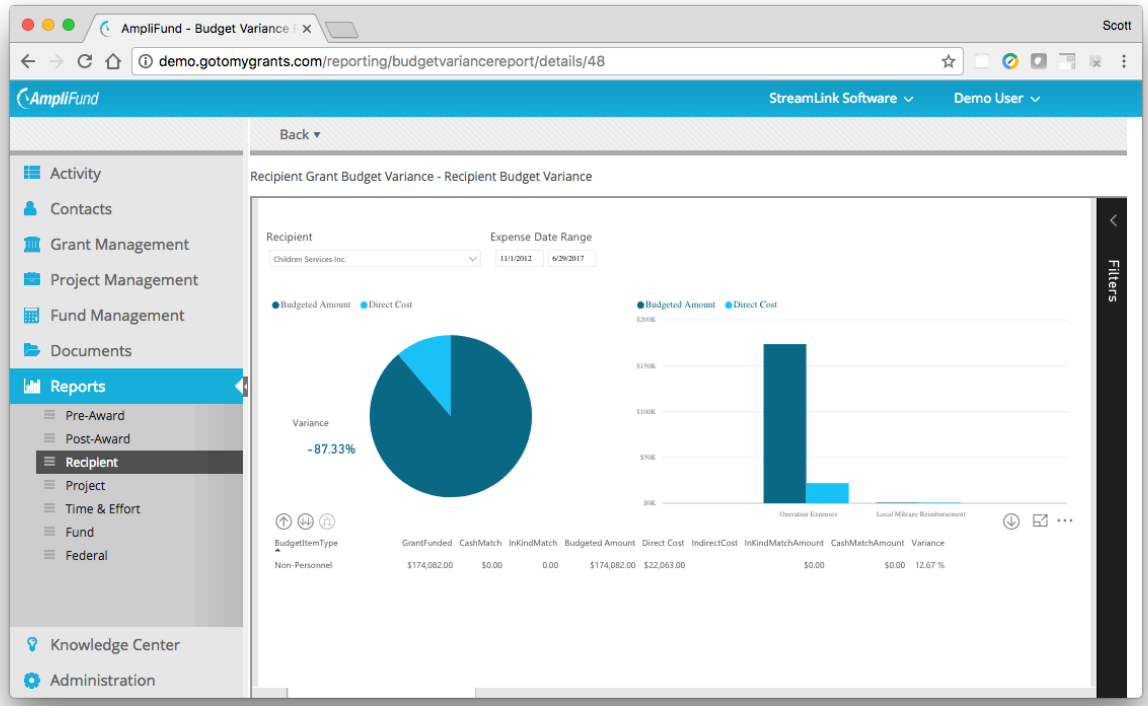

4 Sub-grant Recipients and Award - To-date expenditures / draw-downs?

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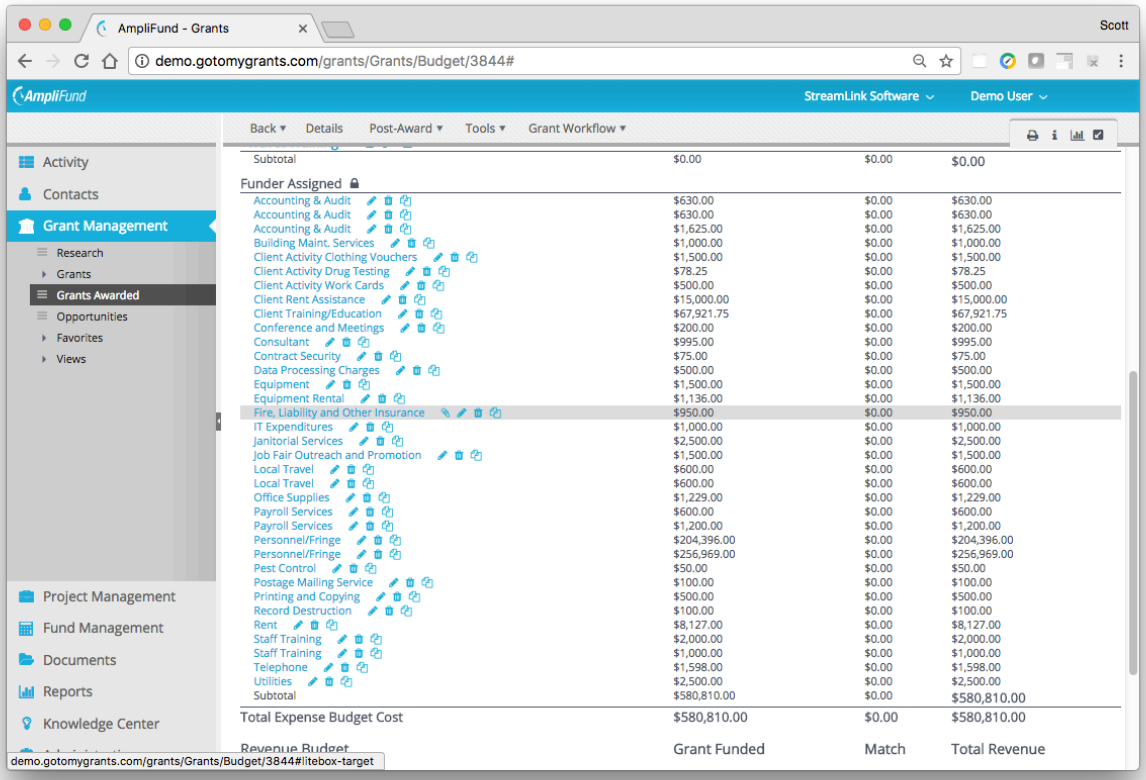

4 Sub-grant Recipients and Award – Archive supporting documentation? **Line item with documentation**

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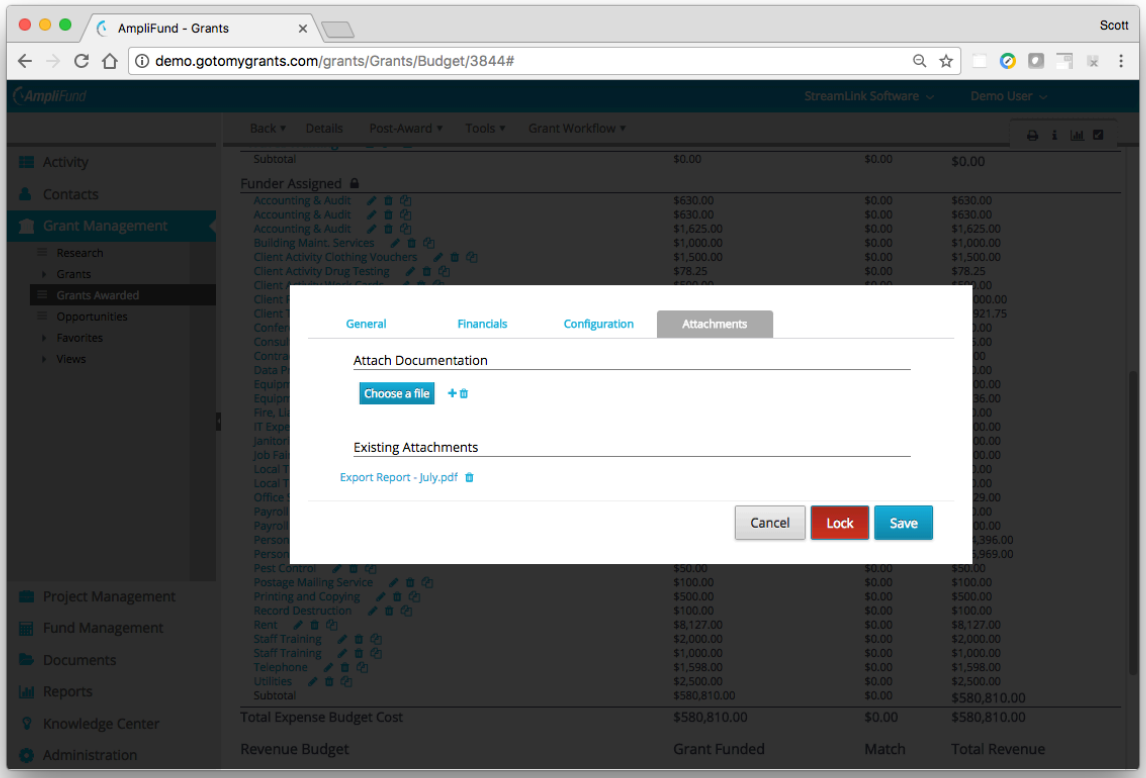

4 Sub-grant Recipients and Award – Archive supporting documentation? **Line item documentation detail**

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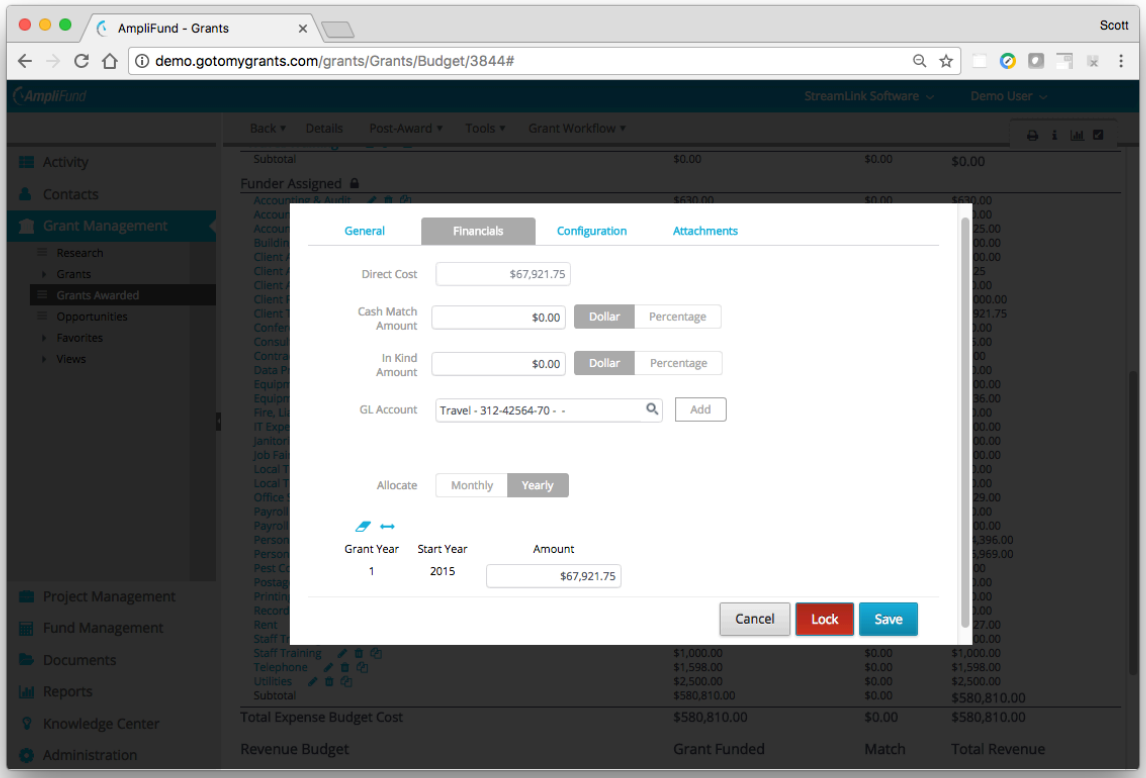

4 Sub-grant Recipients and Award – Match and/or Indirect tracking? **Match**

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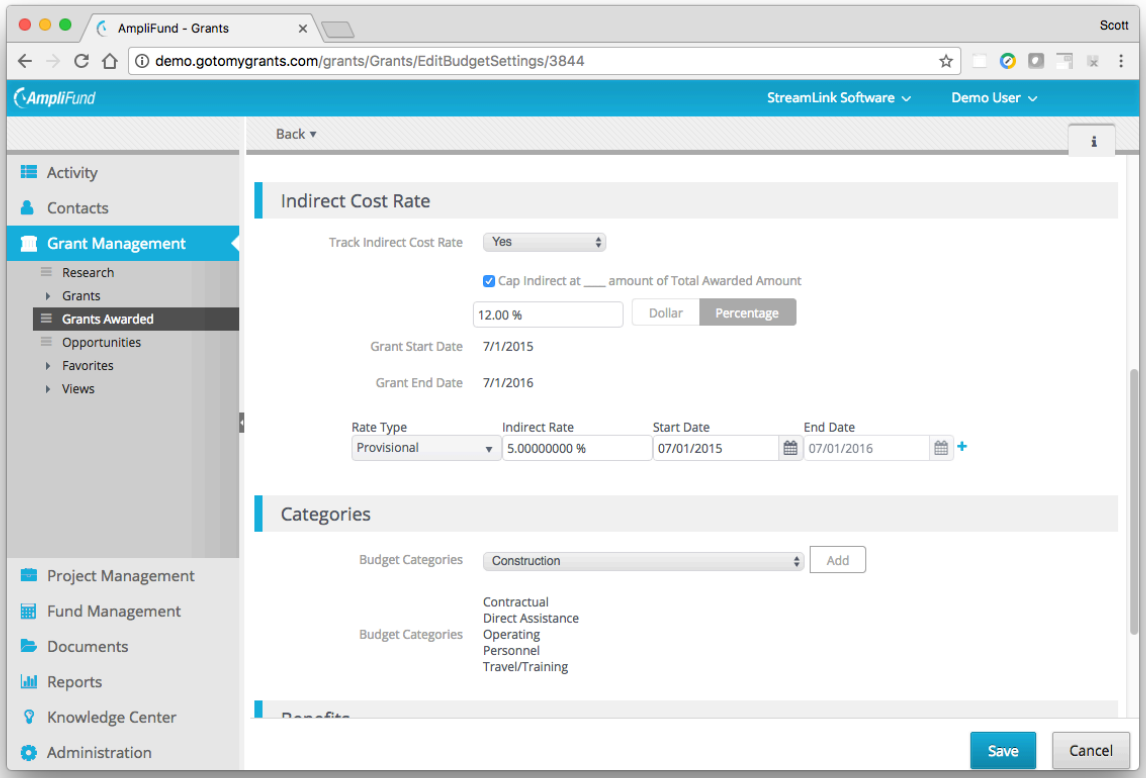

4 Sub-grant Recipients and Award – Match and/or Indirect tracking? **Indirect configuration**

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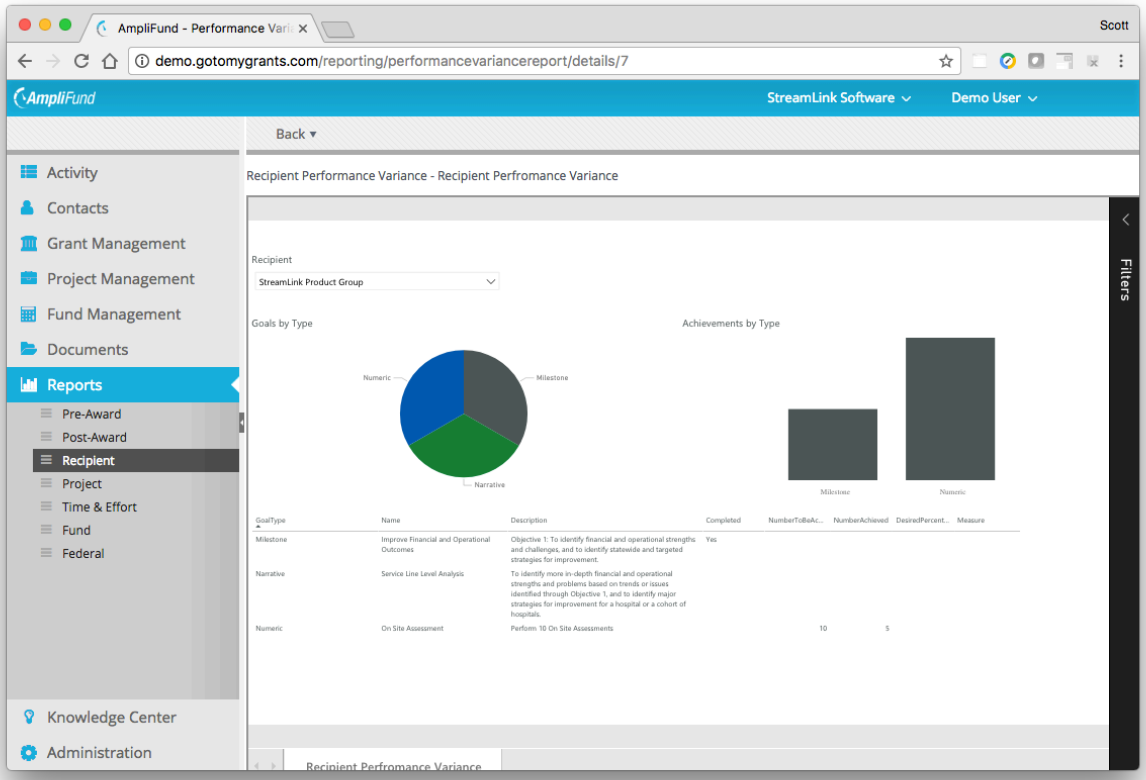

4 Sub-grant Recipients and Award – Outcome performance measurements?

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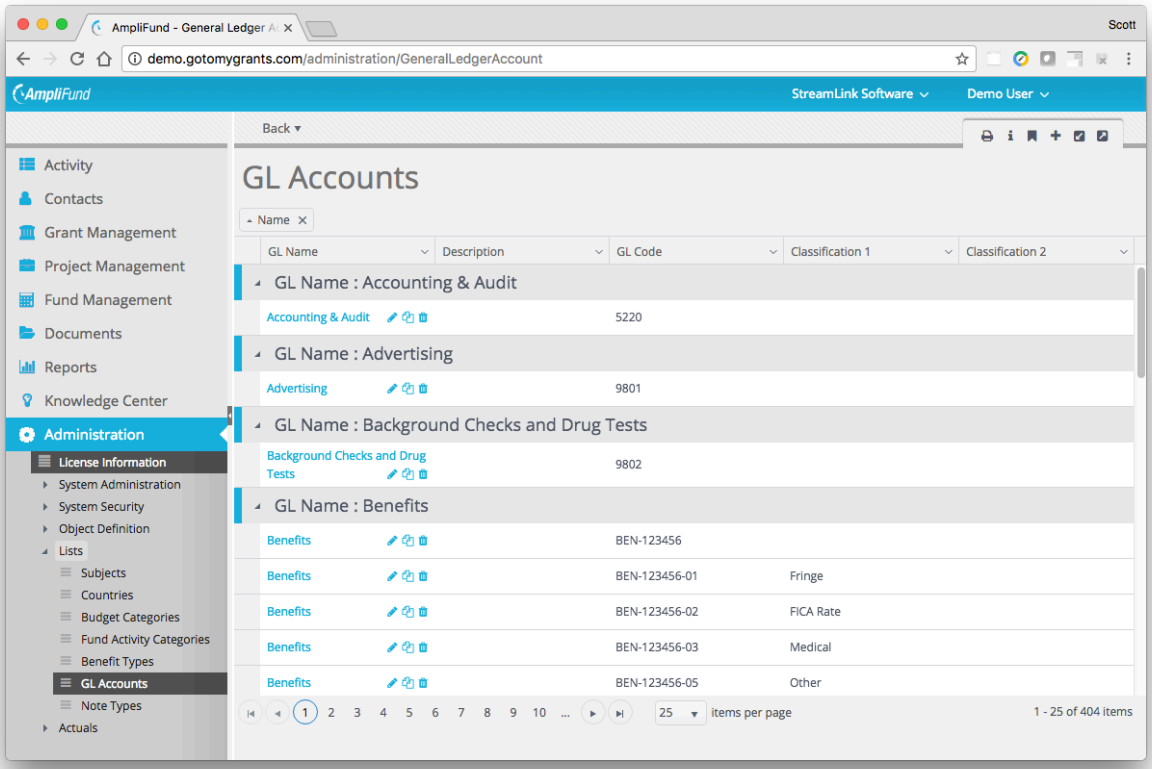

4 Sub-grant Recipients and Award - Interface data with Nevada's financial management system?

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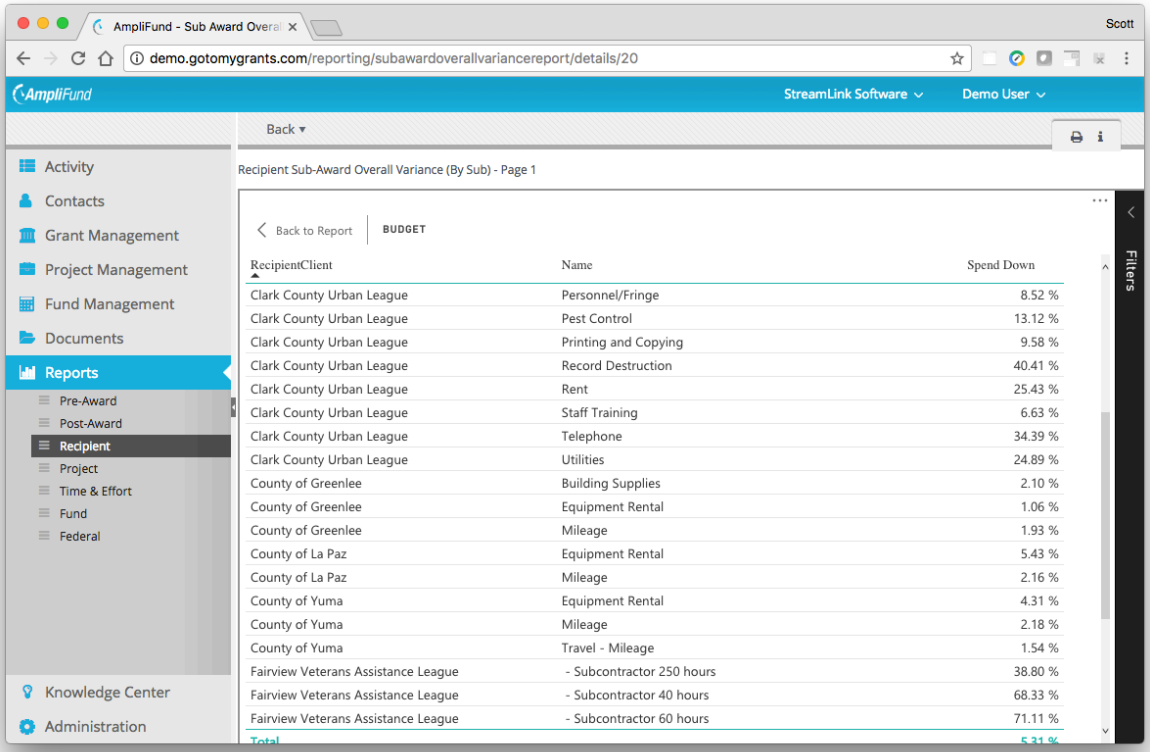

RecipientClient	Name	Spend Down
Clark County Urban League	Personnel/Fringe	8.52 %
Clark County Urban League	Pest Control	13.12 %
Clark County Urban League	Printing and Copying	9.58 %
Clark County Urban League	Record Destruction	40.41 %
Clark County Urban League	Rent	25.43 %
Clark County Urban League	Staff Training	6.63 %
Clark County Urban League	Telephone	34.39 %
Clark County Urban League	Utilities	24.89 %
County of Greenlee	Building Supplies	2.10 %
County of Greenlee	Equipment Rental	1.06 %
County of Greenlee	Mileage	1.93 %
County of La Paz	Equipment Rental	5.43 %
County of La Paz	Mileage	2.16 %
County of Yuma	Equipment Rental	4.31 %
County of Yuma	Mileage	2.18 %
County of Yuma	Travel - Mileage	1.54 %
Fairview Veterans Assistance League	- Subcontractor 250 hours	38.80 %
Fairview Veterans Assistance League	- Subcontractor 40 hours	68.33 %
Fairview Veterans Assistance League	- Subcontractor 60 hours	71.11 %
Total		5.31 %

4 Sub-grant Recipients and Award - View sub-recipient cross-agency data?

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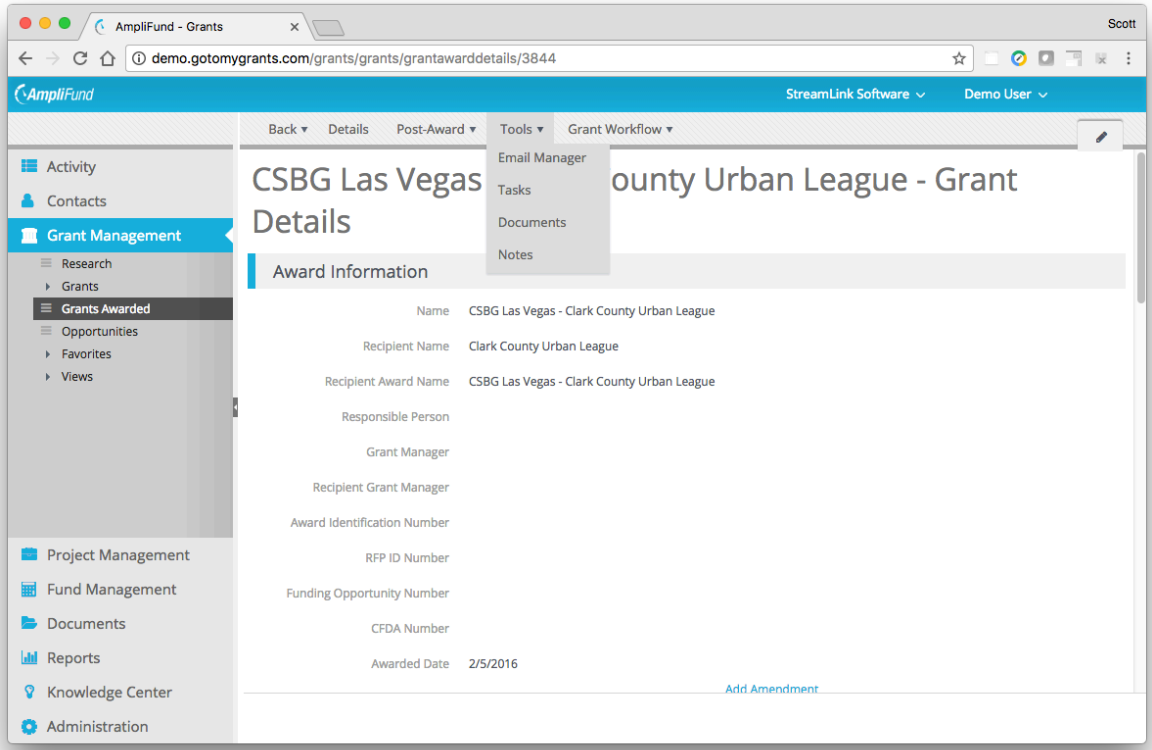

4 Sub-grant Recipients and Award - Single audit monitoring tools?

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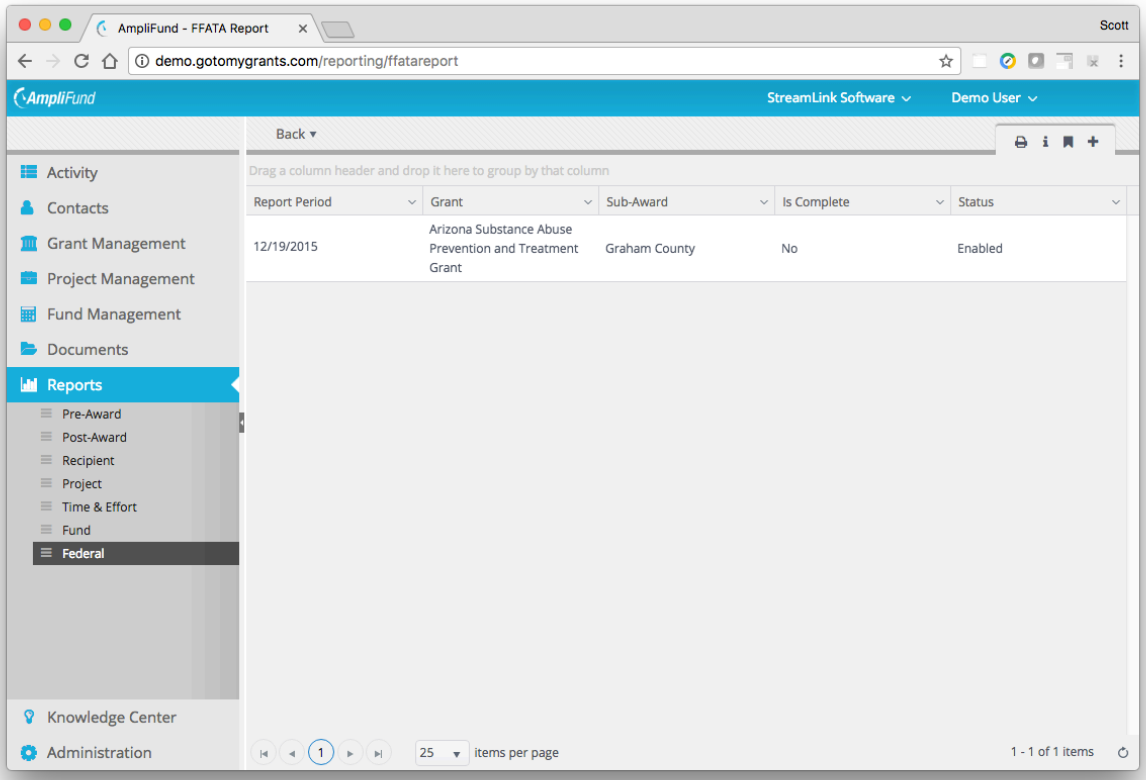

4 Sub-grant Recipients and Award - FFATA Transparency monitoring tools?

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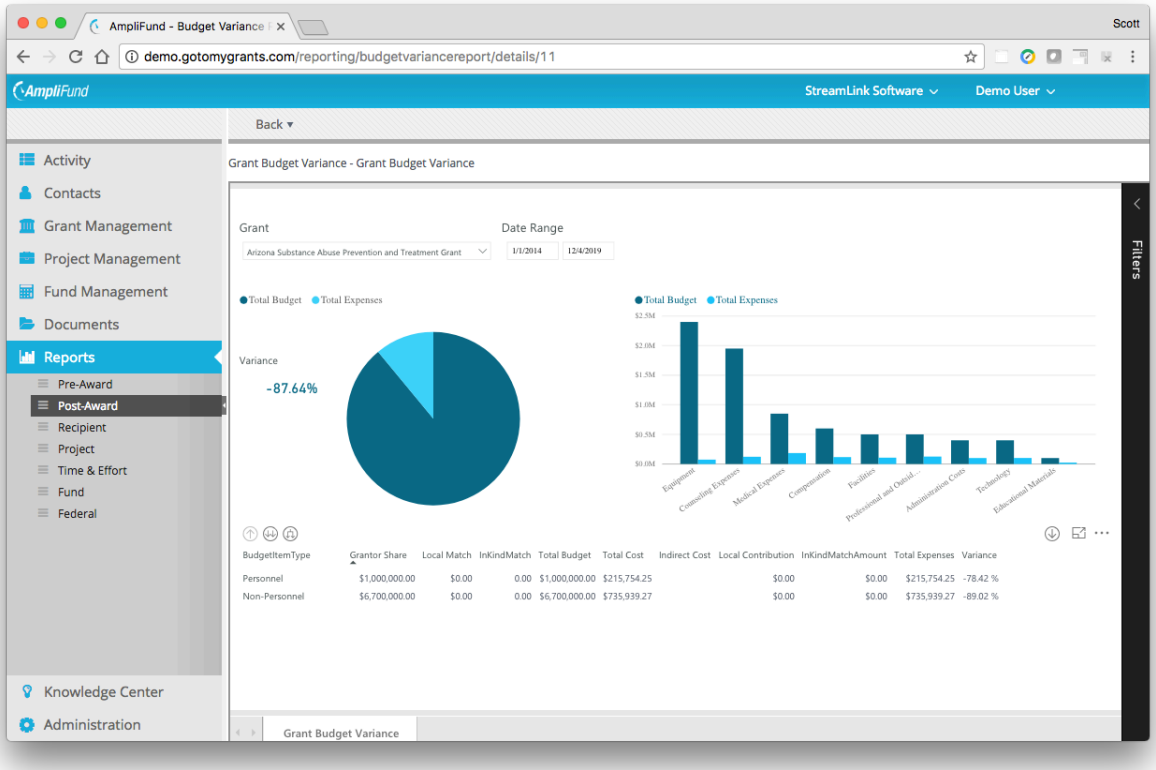

5 Post-award Grant Management - Track real-time, budget-to-actual expenditures?

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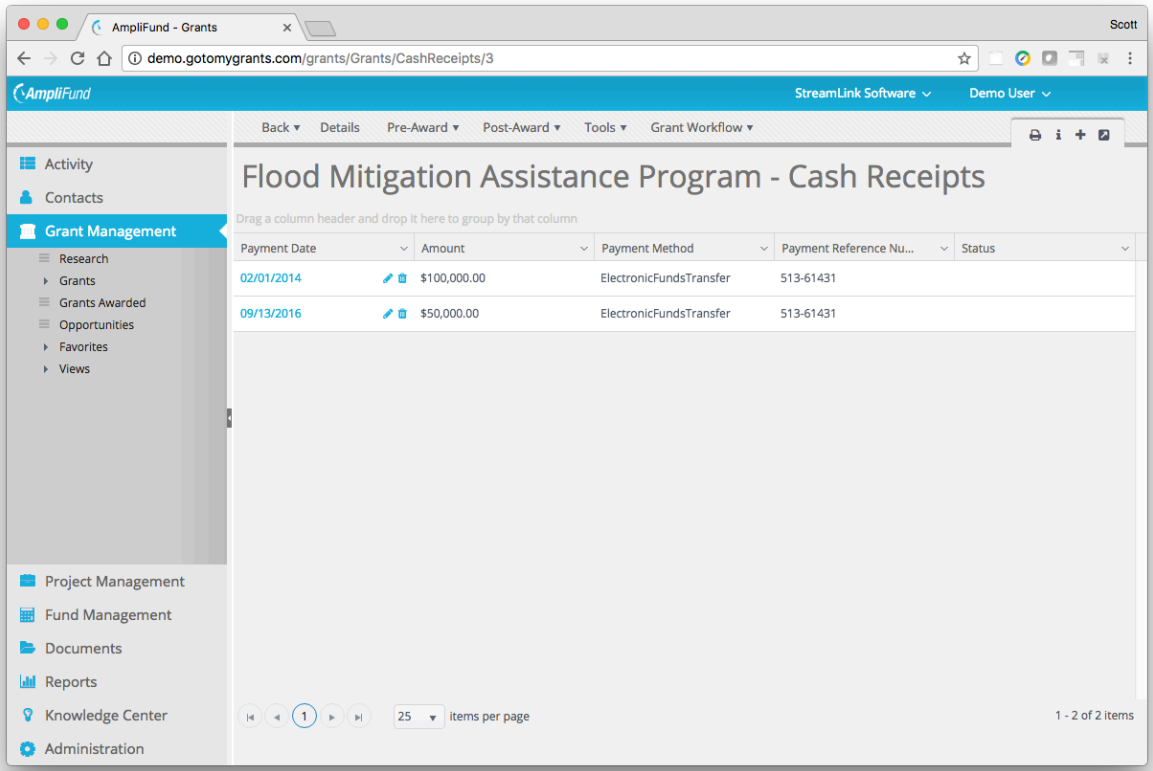

5 Post-award Grant Management - To-date draw-down and reconciliation?

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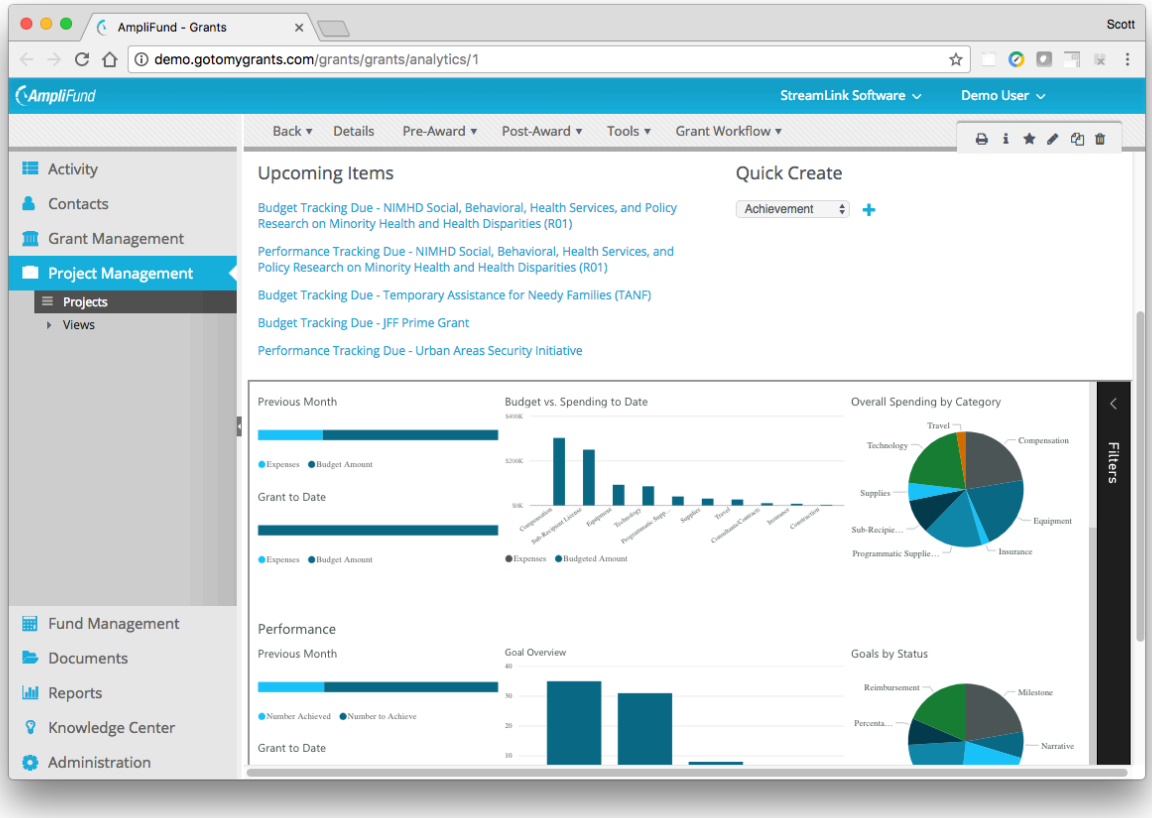
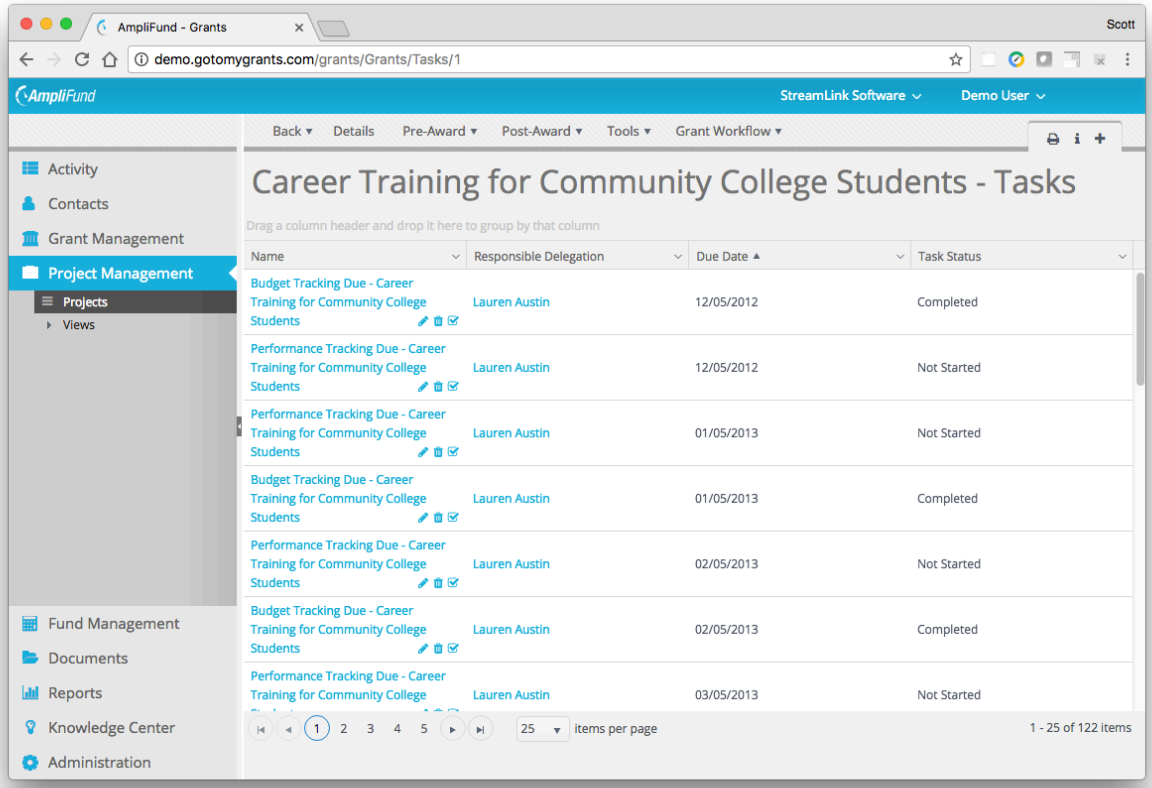


5 Post-award Grant Management - Track program activity/tasks? – **Grant Dashboard view of tasks**

© StreamLink™ Software



5 Post-award Grant Management - Track program activity/tasks? – **Grant task list**

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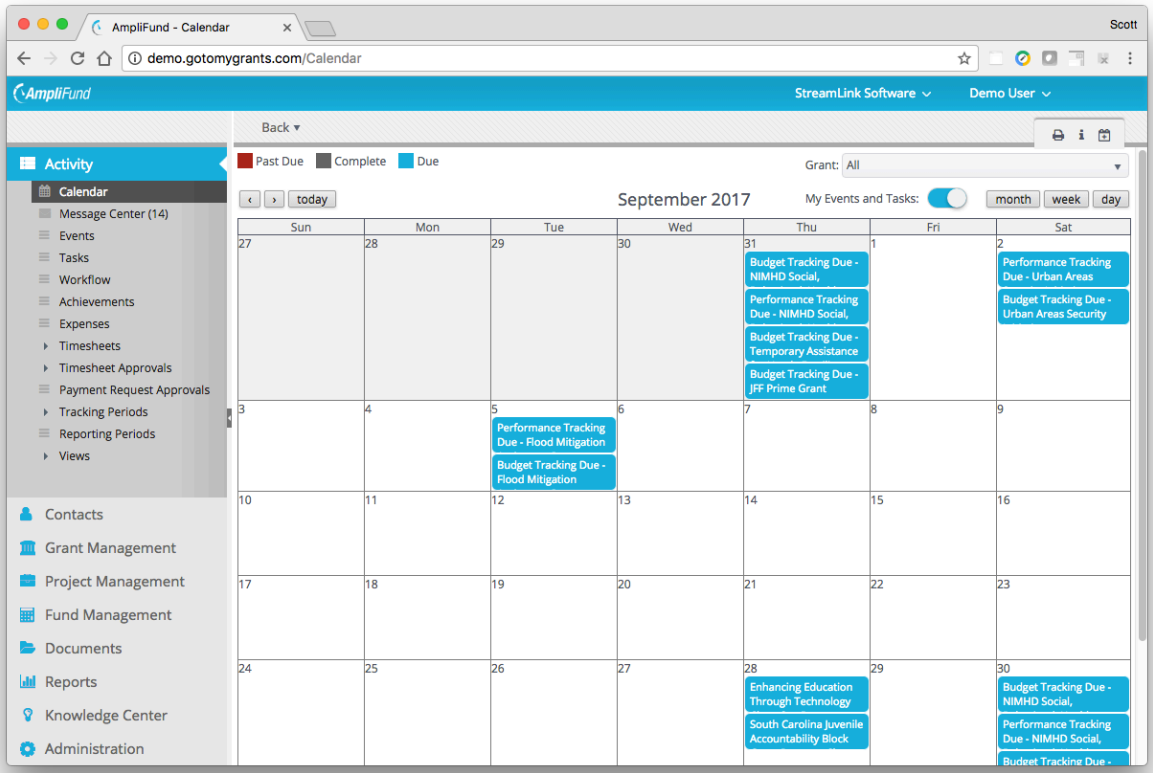

5 Post-award Grant Management - Track program activity/tasks? – **Calendar view of all grant tasks**

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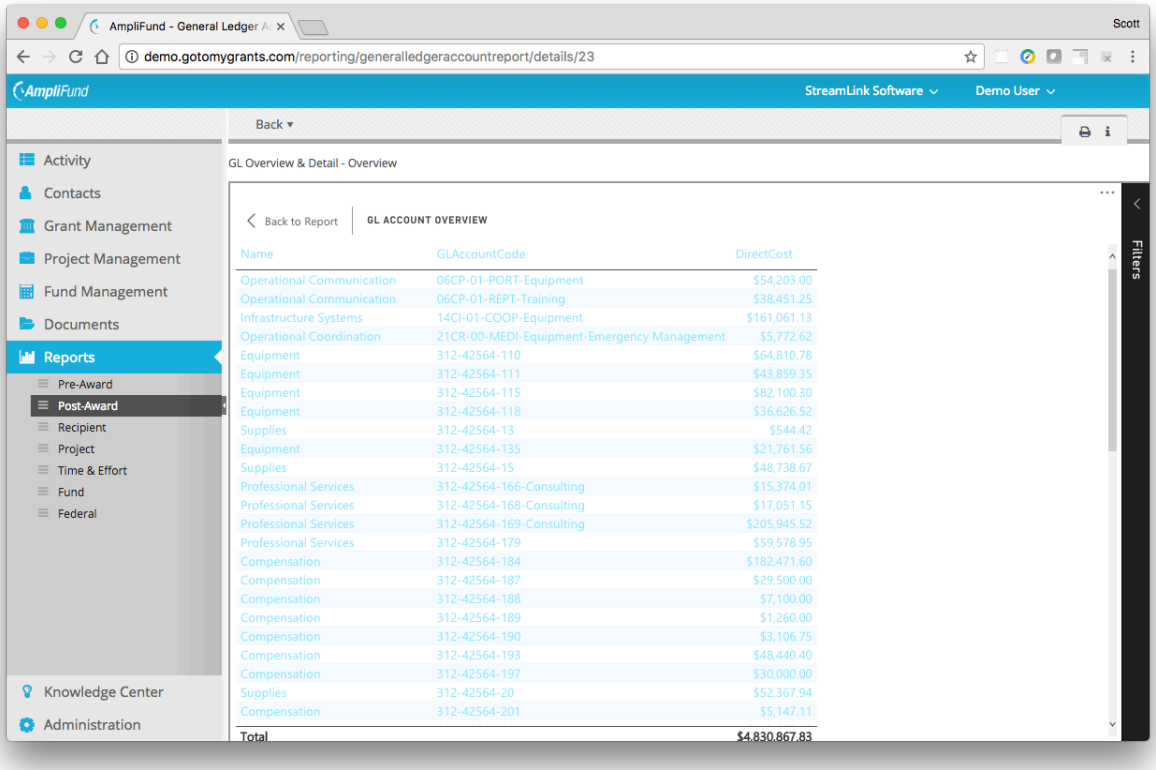

5 Post-award Grant Management - View organizational spending?

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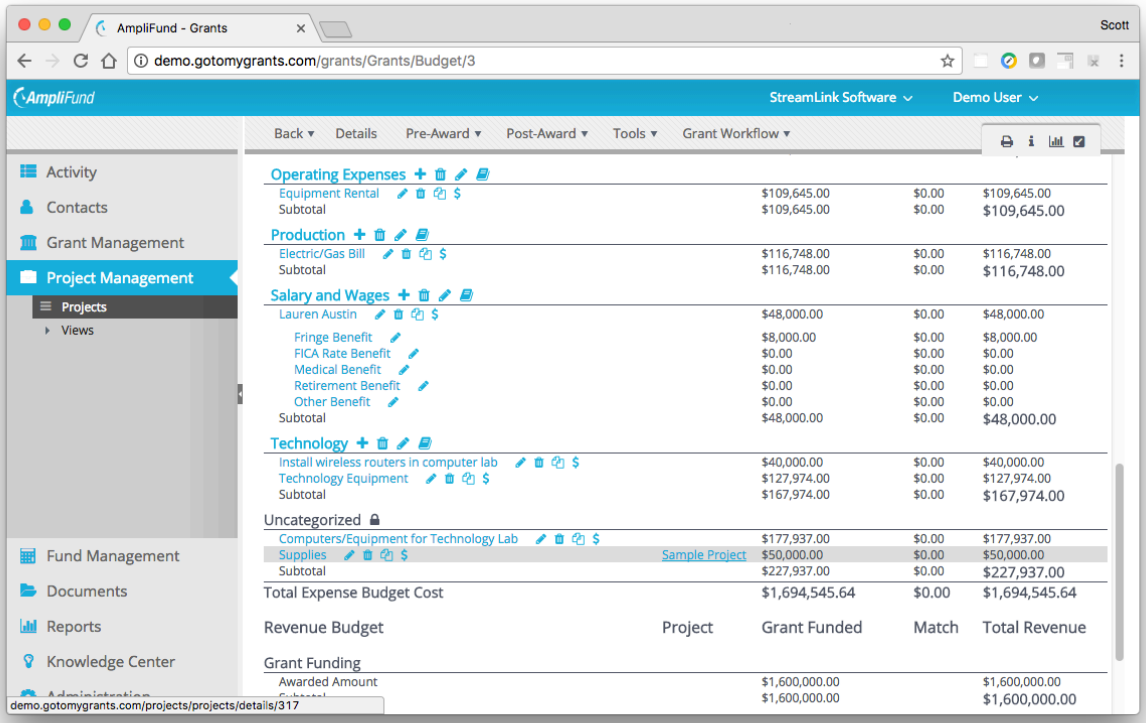

5 Post-award Grant Management - Track allocations by activity within each grant program?
Project

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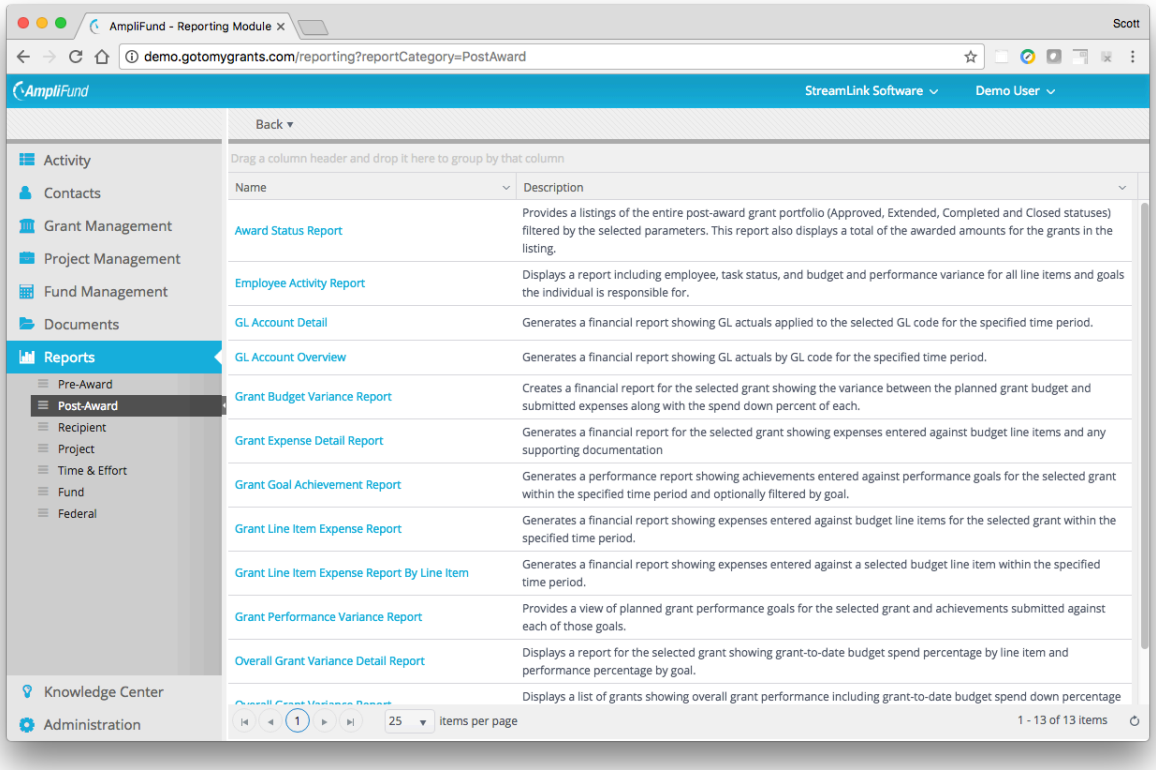

5 Post-award Grant Management - Standard data reporting?

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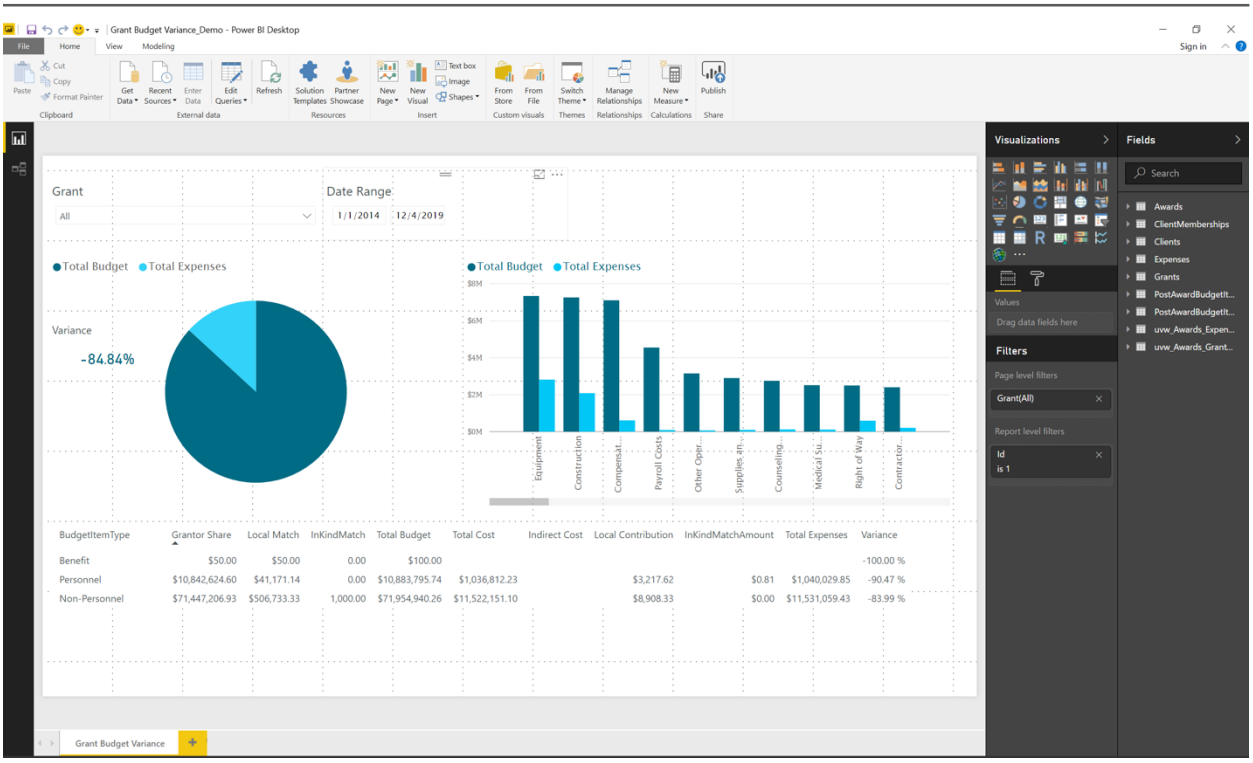

5 Post-award Grant Management - Customized data reporting?

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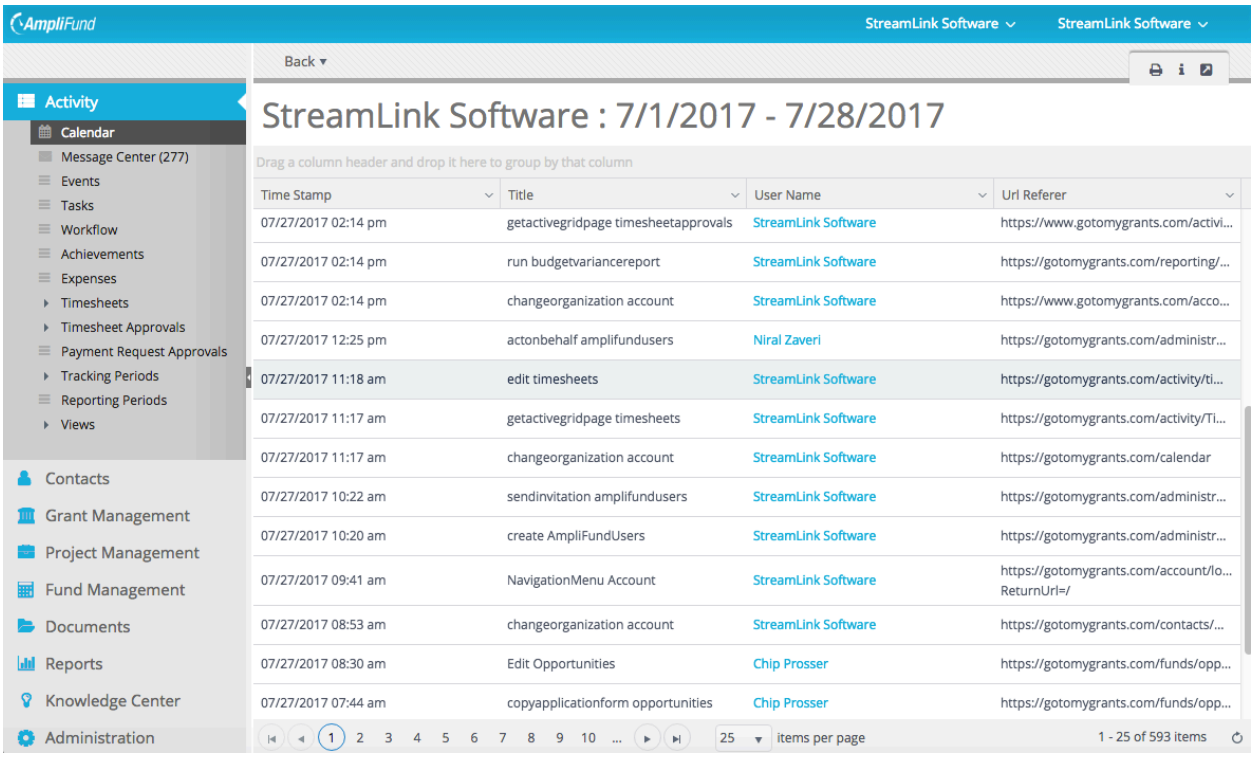

5 Post-award Grant Management - Historical audit log of changes to project?

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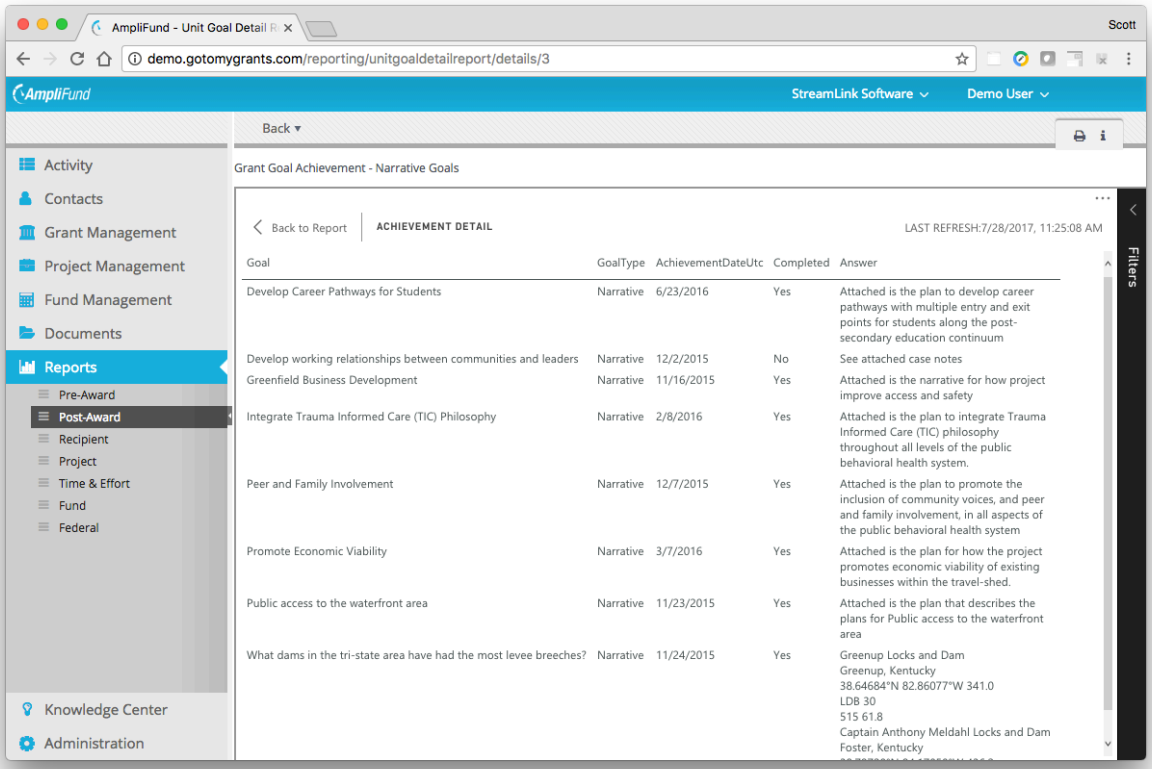

5 Post-award Grant Management - Outcome performance measurements?

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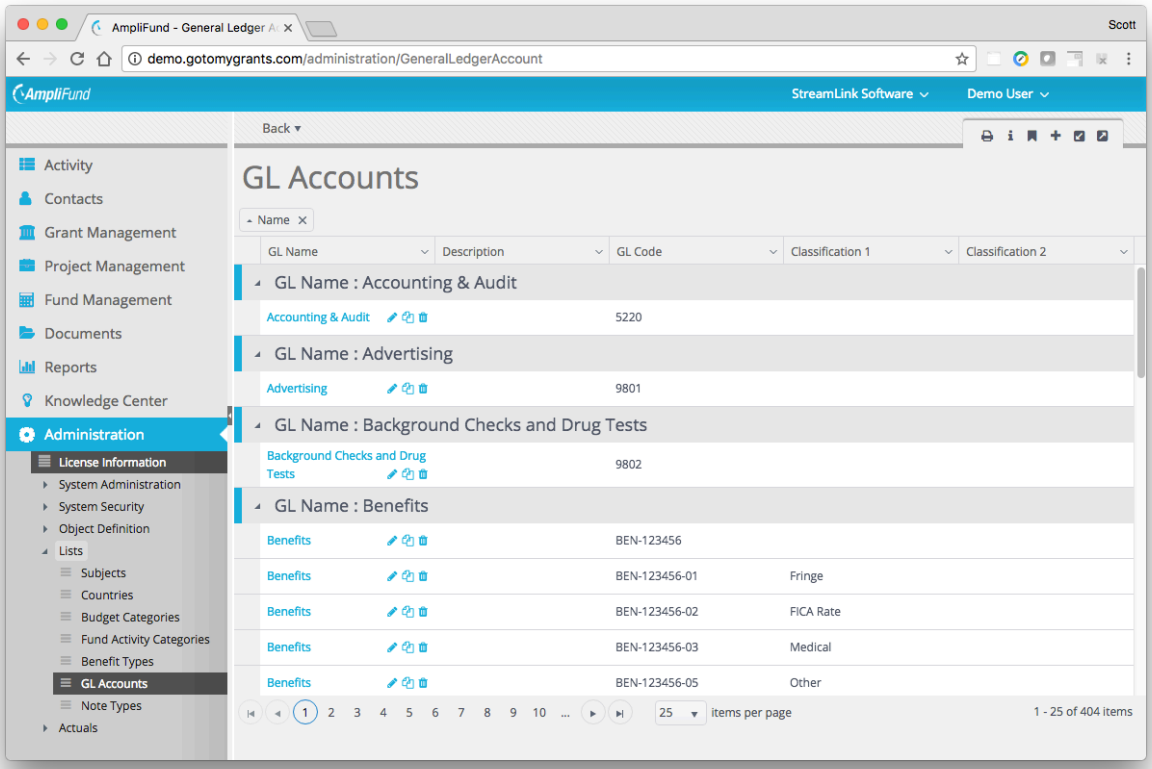

5 Post-award Grant Management - Interface data with Nevada's financial management system?
GL Account definition

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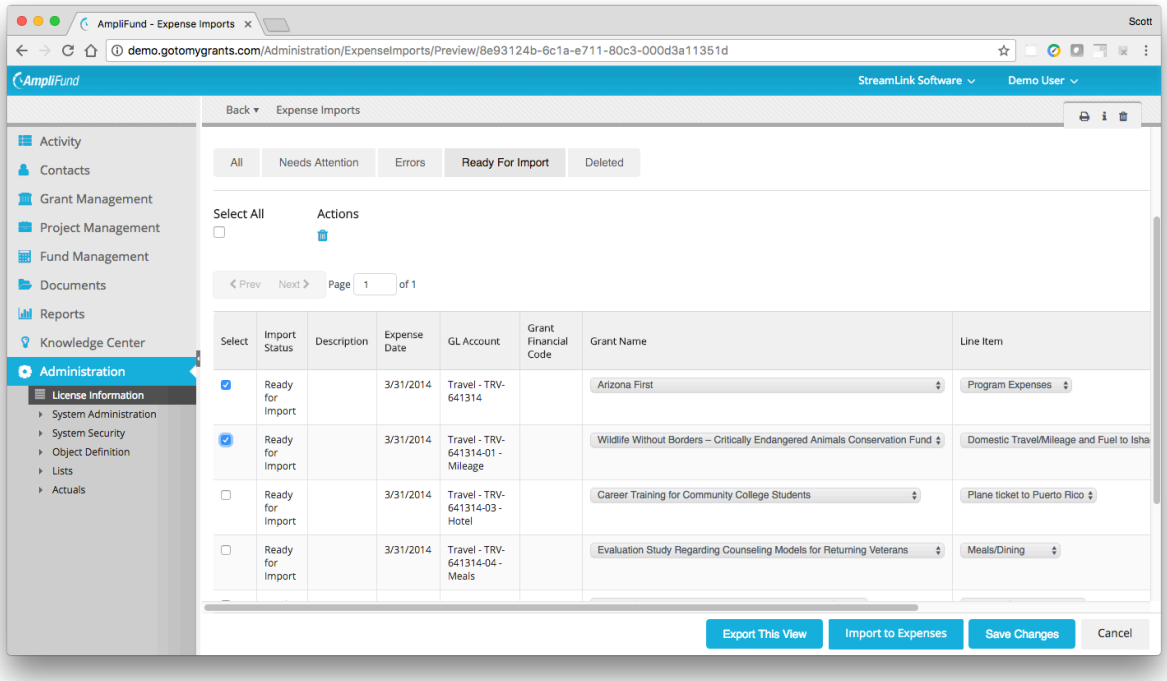

5 Post-award Grant Management - Interface data with Nevada's financial management system?
Expense import

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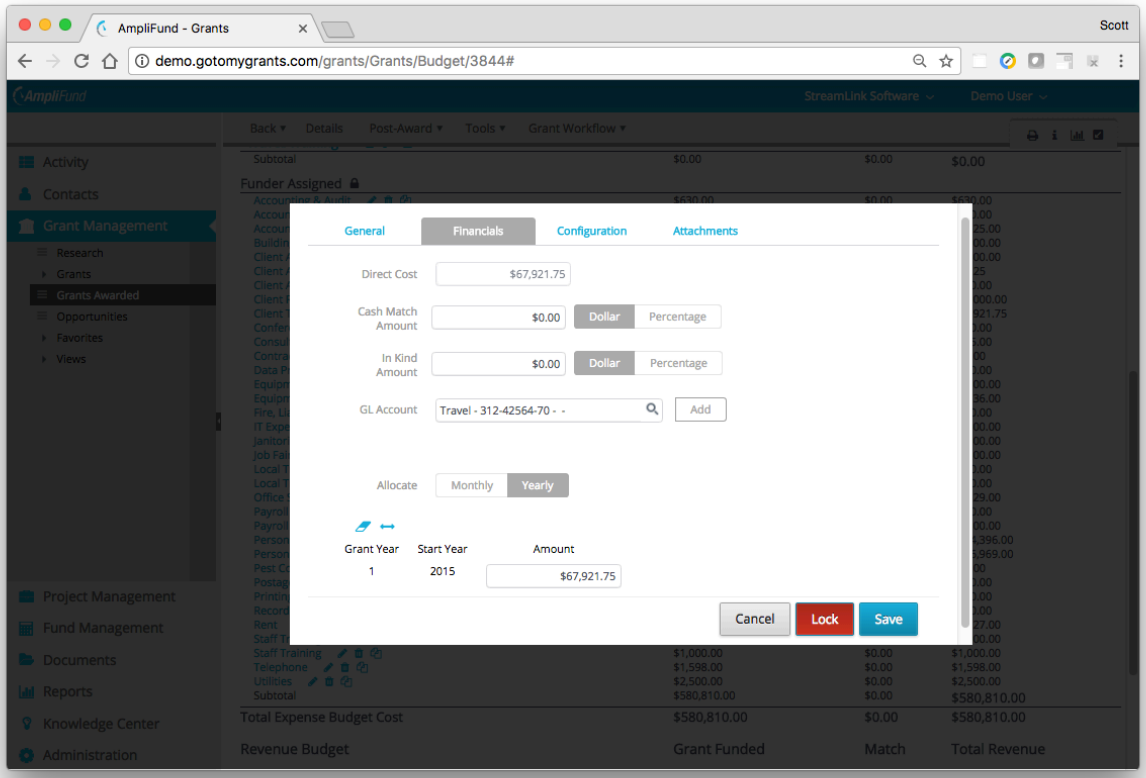

5 Post-award Grant Management - Match and/or Indirect track & reconciliation? **Match**

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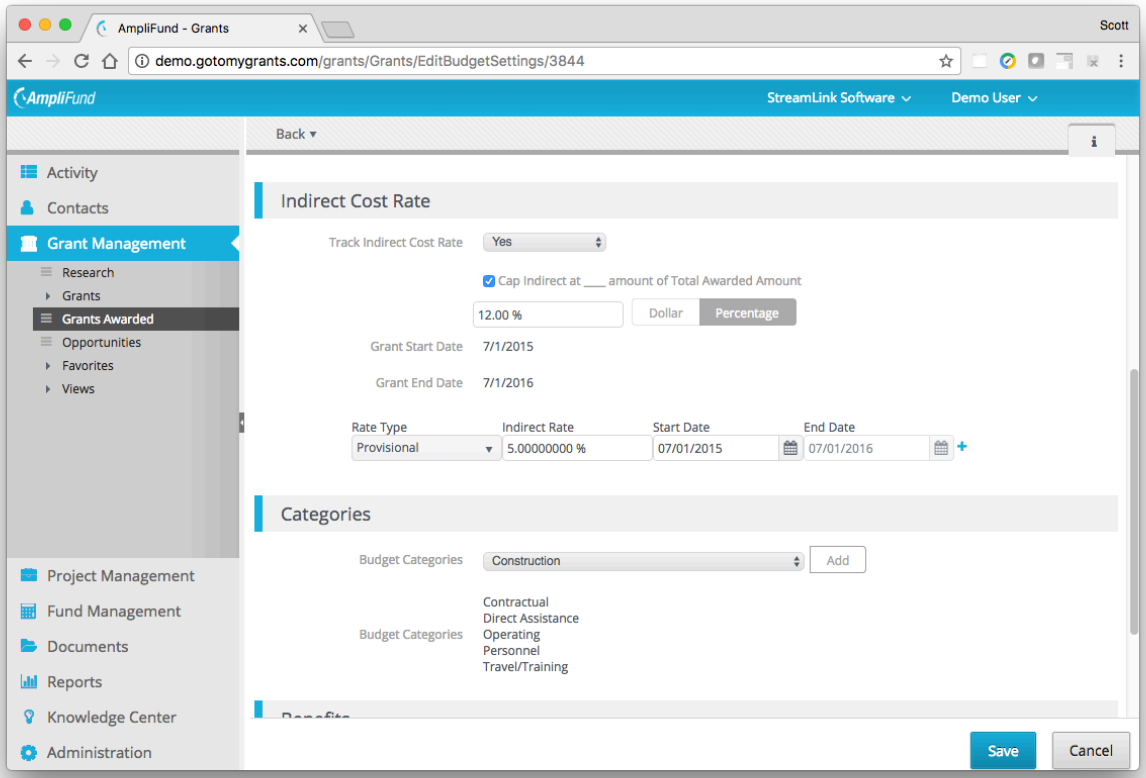

5 Post-award Grant Management - Match and/or Indirect track & reconciliation? **Indirect**

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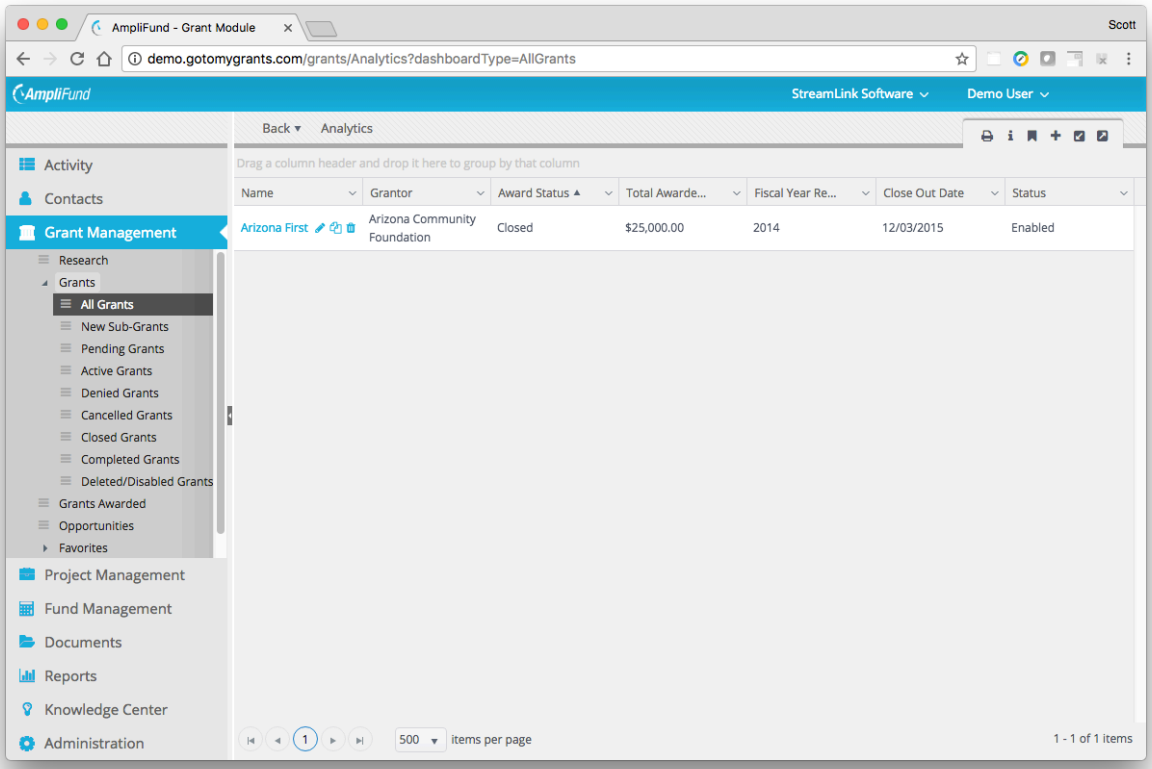

6 Grant Closeout - Track and secure grant closures? **Status**

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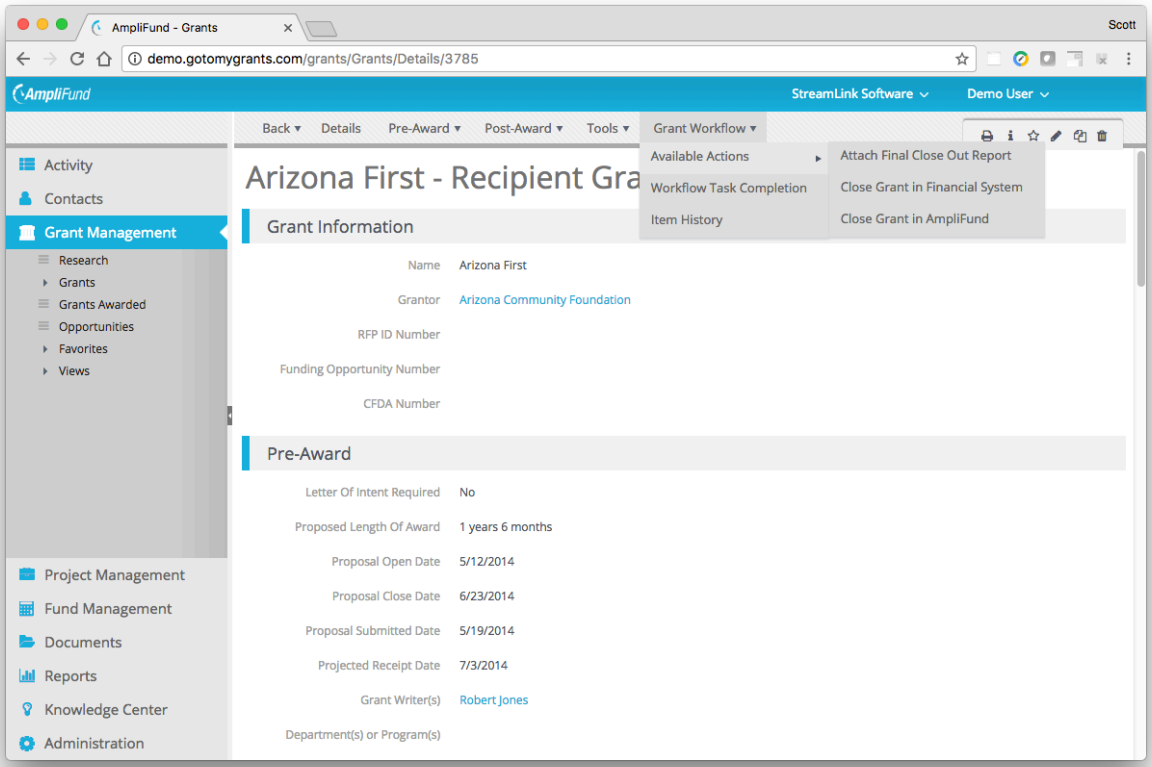

6 Grant Closeout - Track and secure grant closures? **Workflow**

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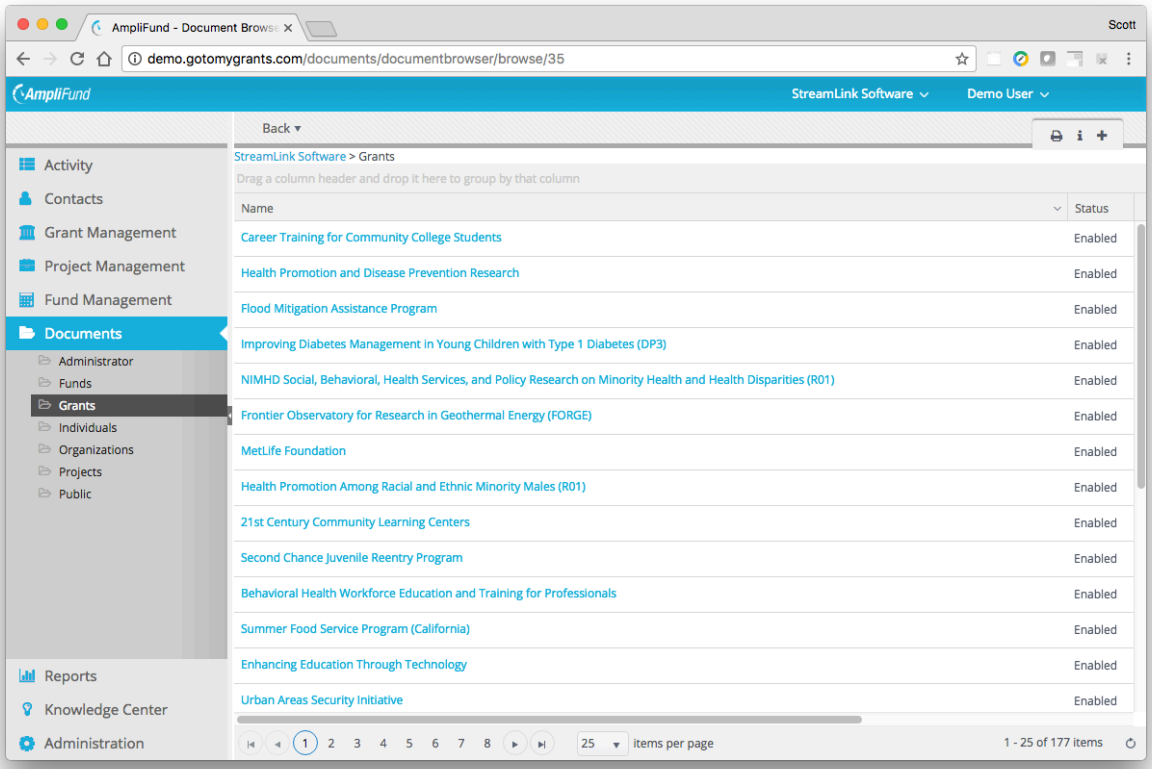

6 Grant Closeout - Preserve associated documentation? **All grant document folders**

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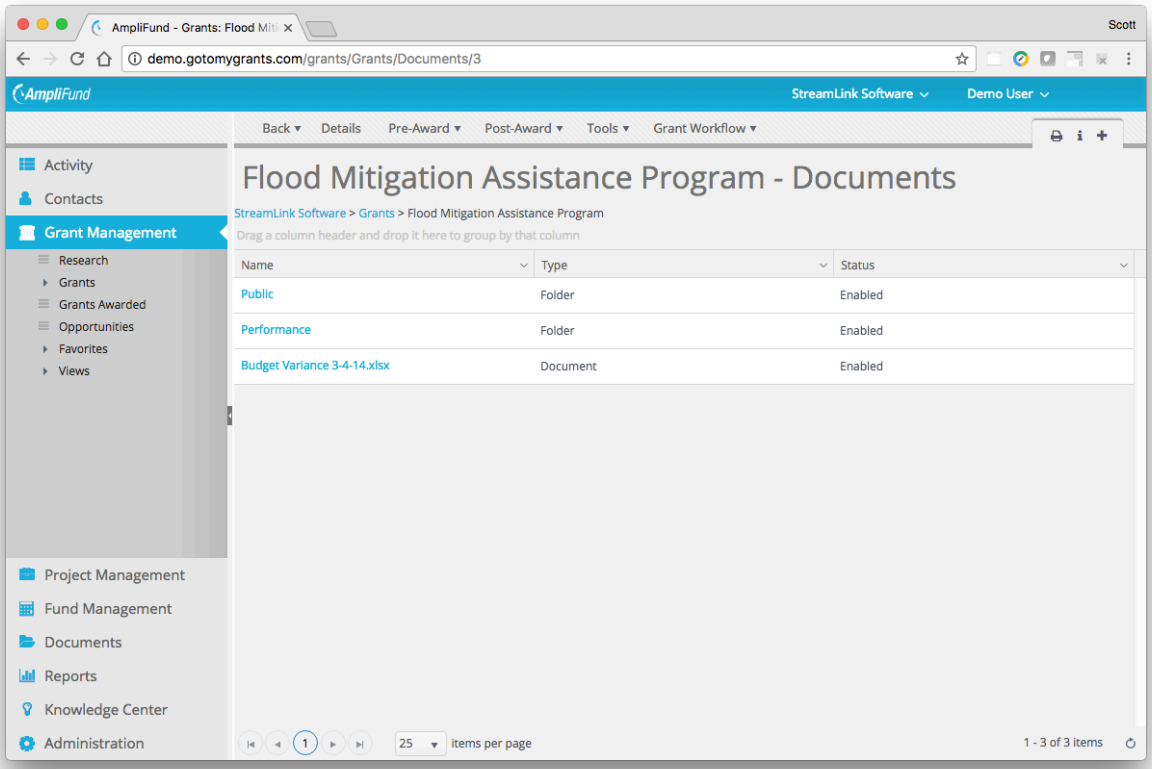

6 Grant Closeout - Preserve associated documentation? **Grant documents**

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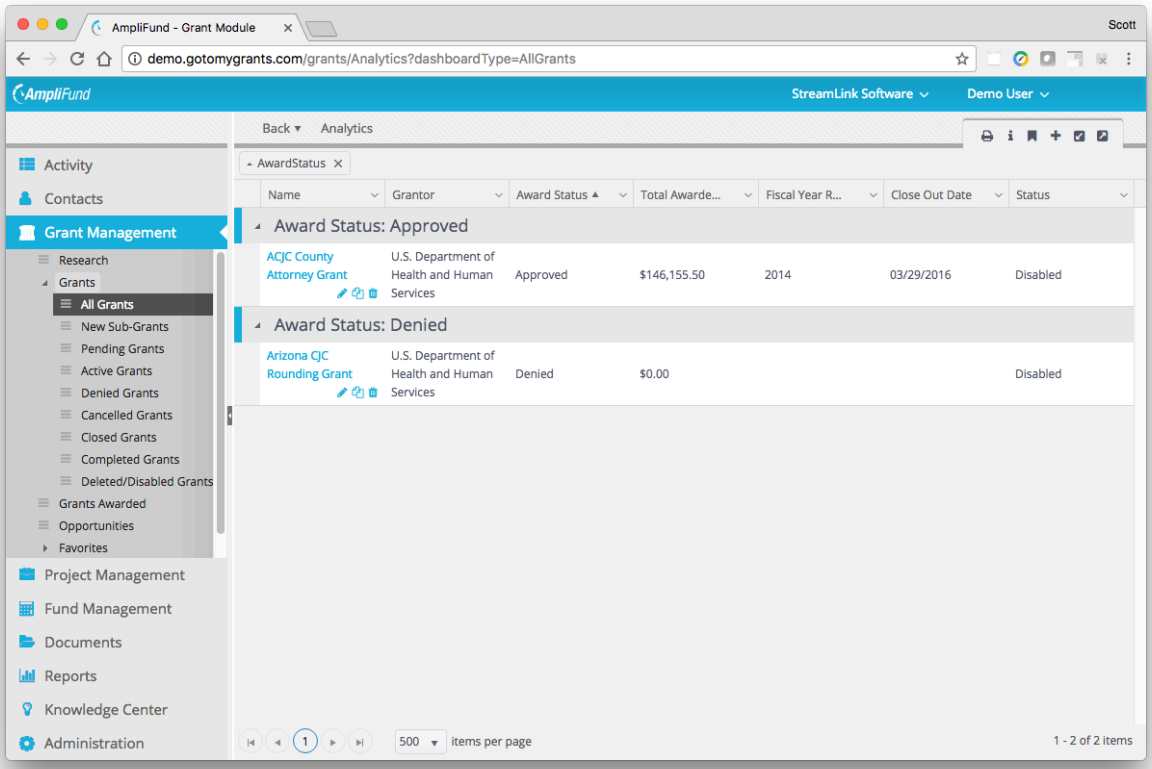

6 Grant Closeout - Archive grant file library for audit purposes?

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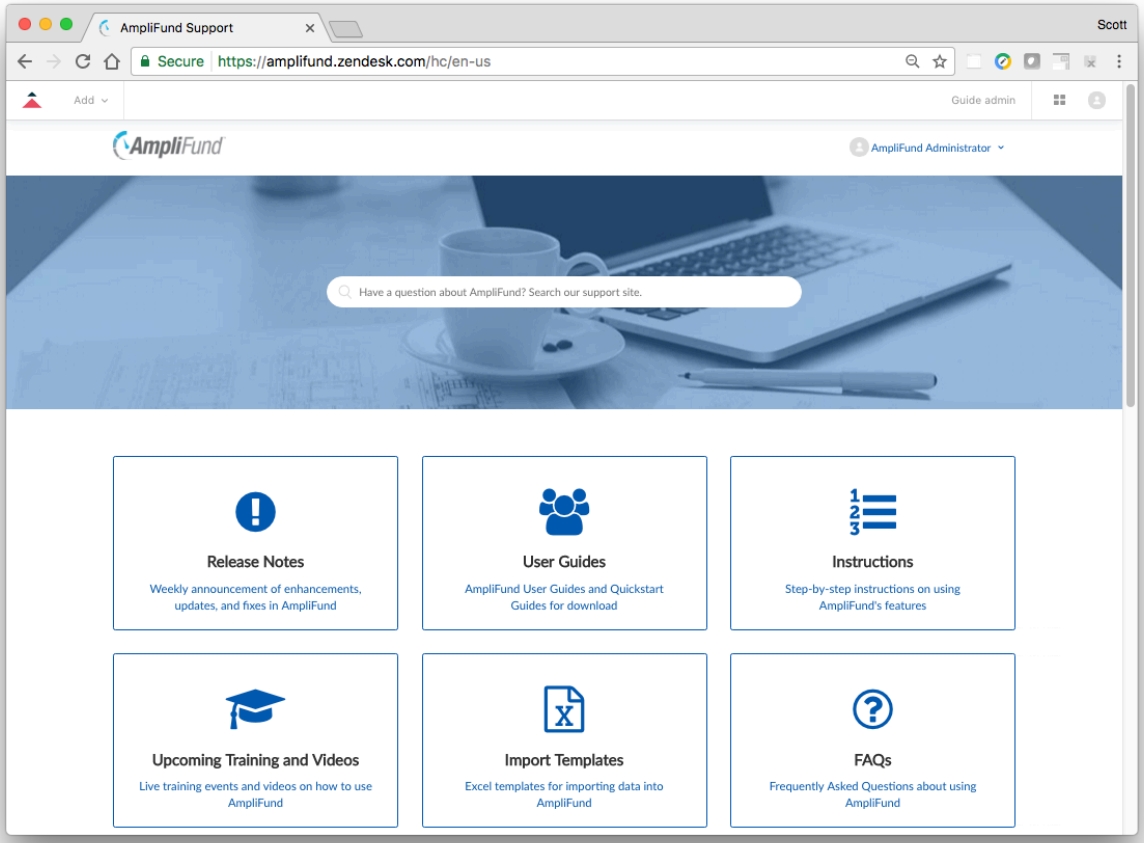

7 Professional Development (after implementation) – Support Portal – Home

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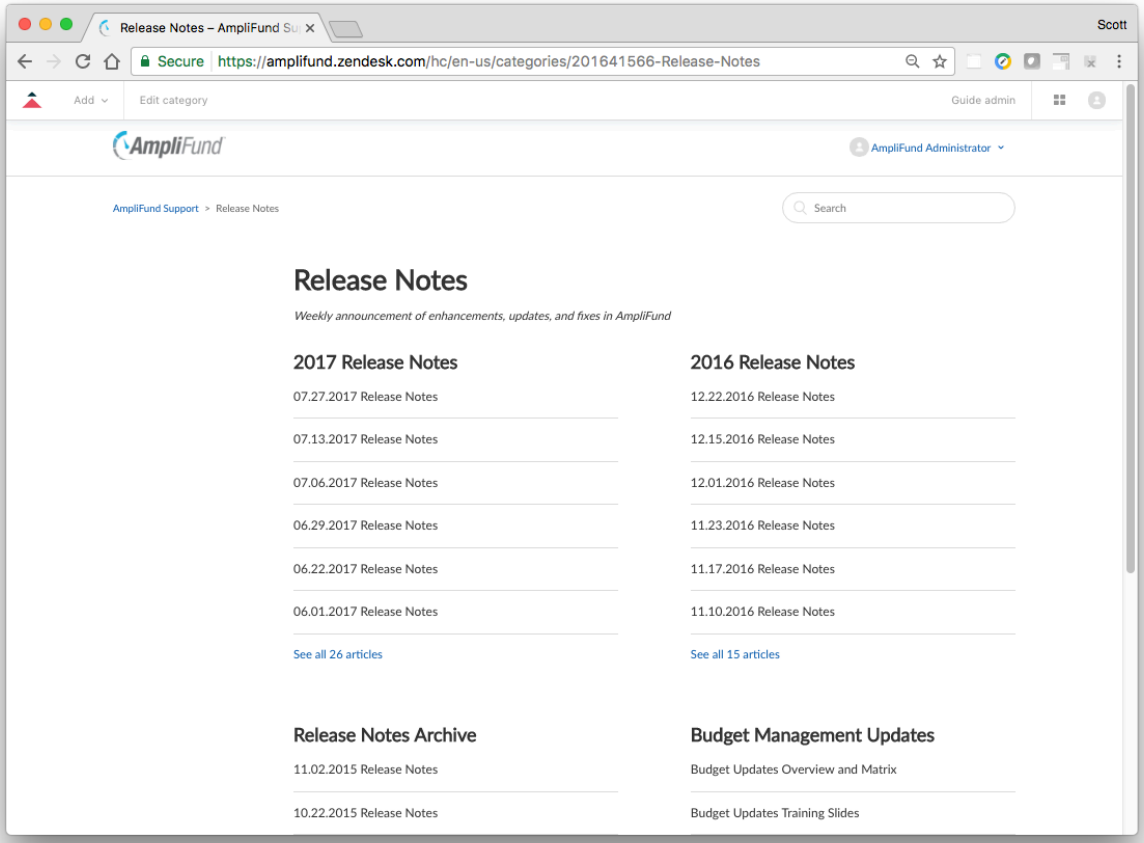

7 Professional Development (after implementation) – Support Portal – Release Notes

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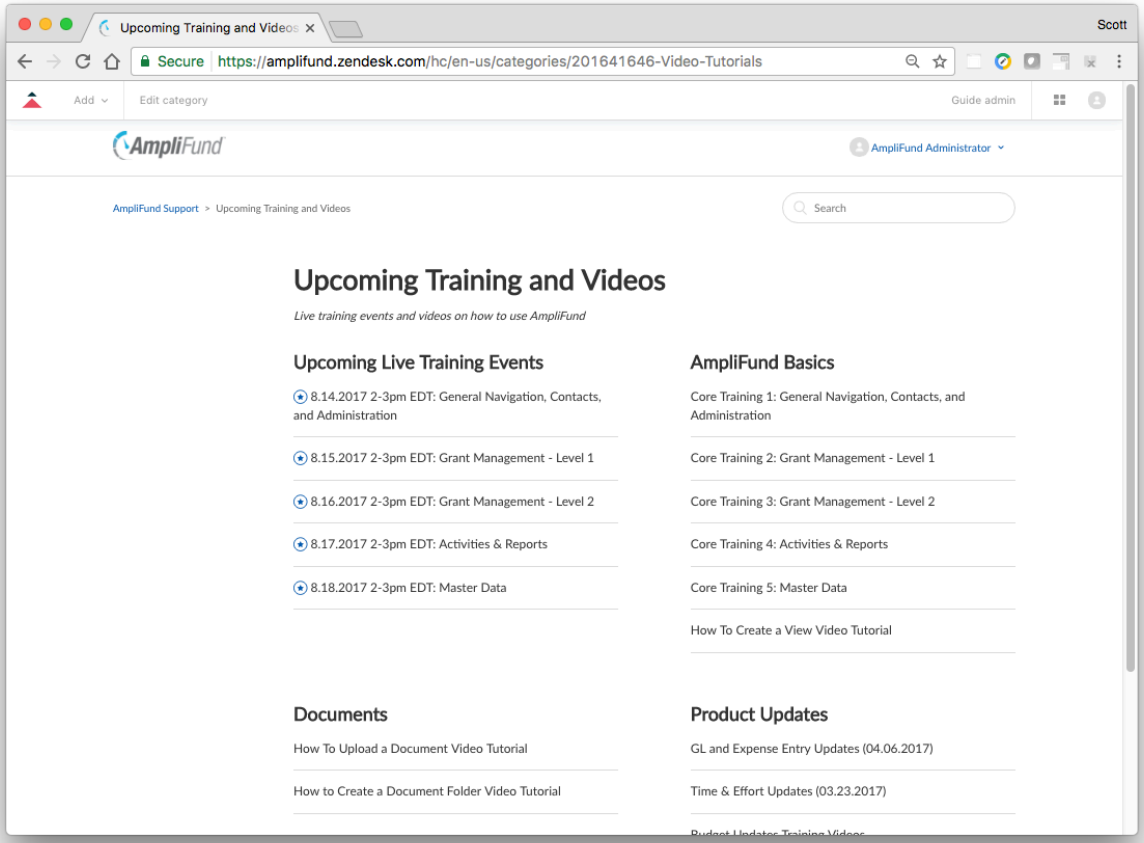

7 Professional Development (after implementation) – Support Portal – Training and Videos

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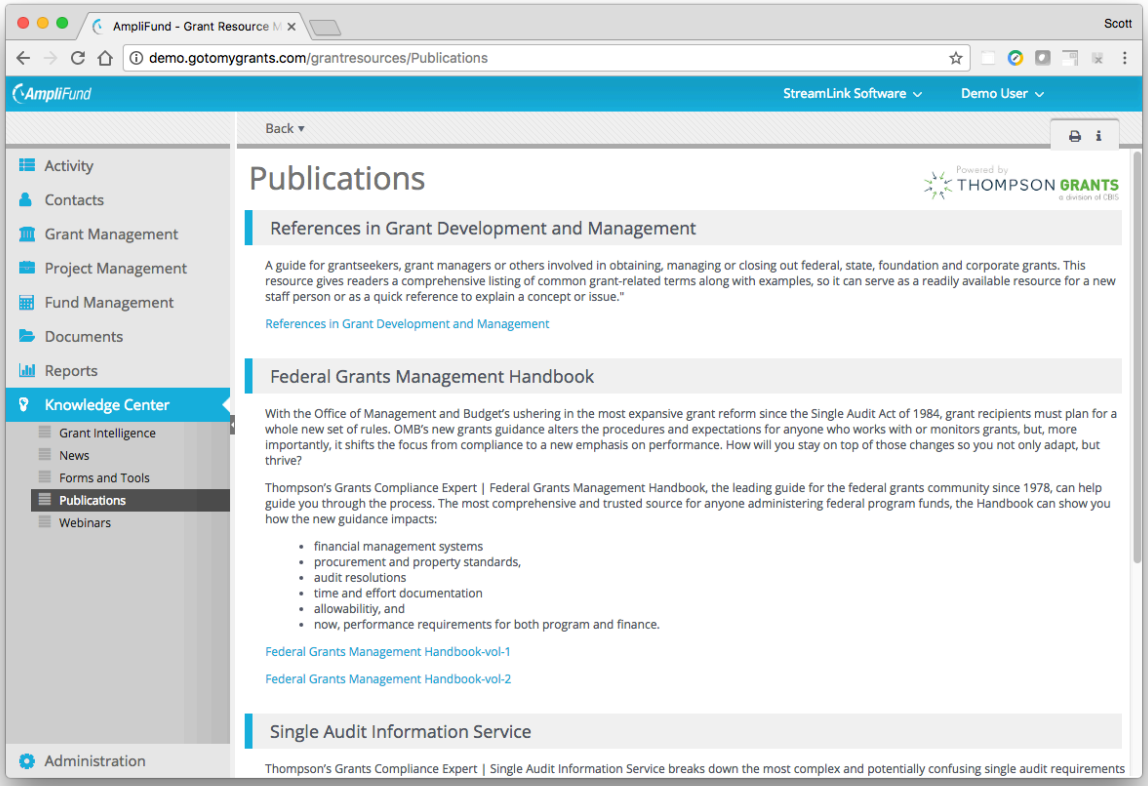

7 Professional Development (after implementation) – Knowledge Center – Technical Books

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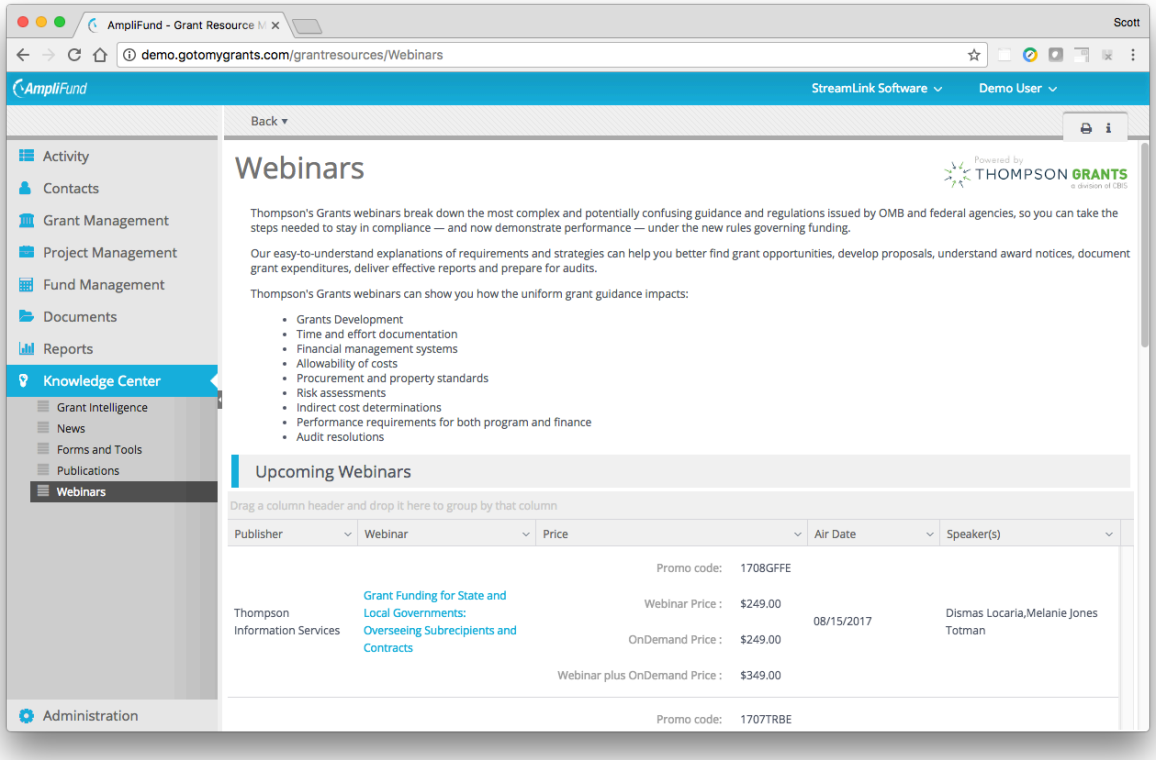

7 Professional Development (after implementation) – Knowledge Center - Webinars

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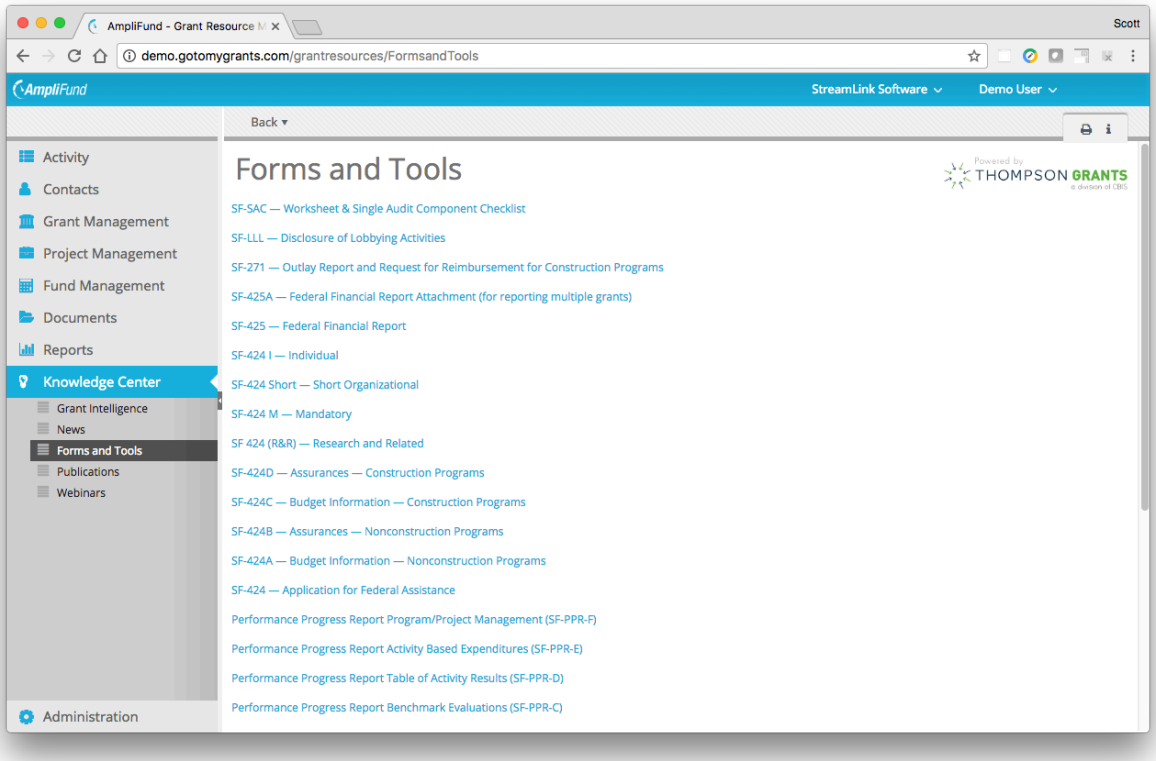

7 Professional Development (after implementation) – Knowledge Center – Forms and Tools

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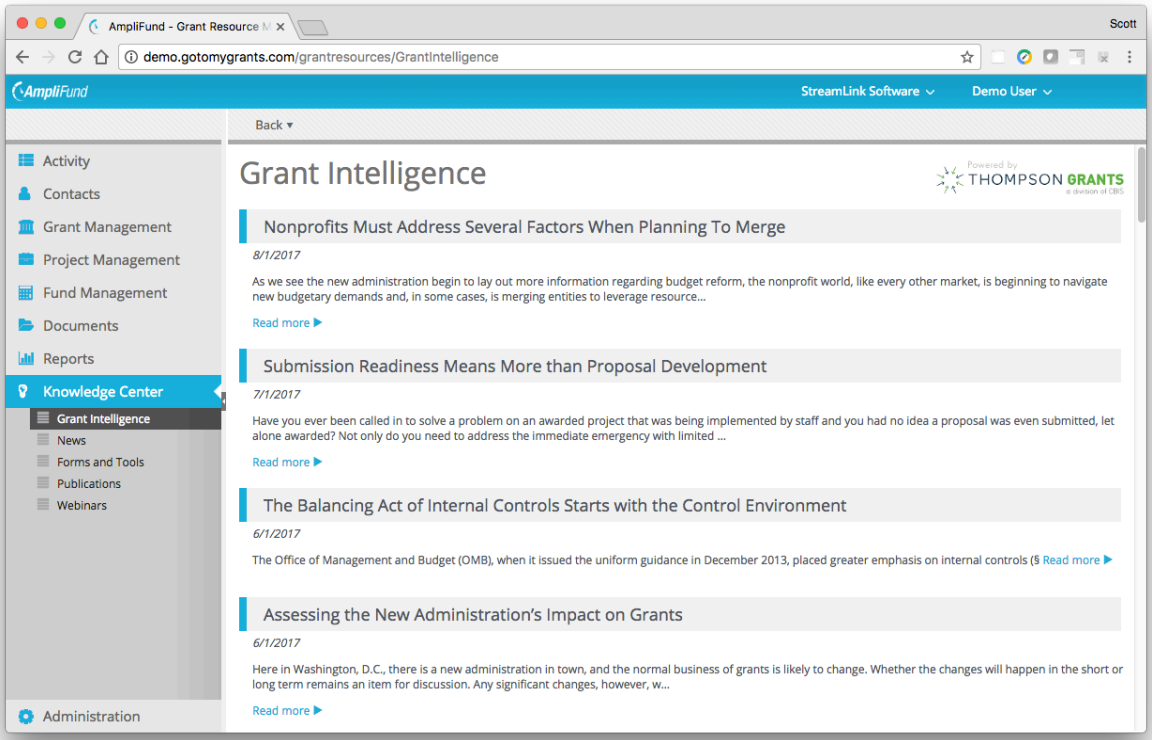

7 Professional Development (after implementation) – Knowledge Center – Grant Intelligence

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Exhibit D - AmpliFund Reports

The Reports module supports pre-award and post-award grant reporting. Reports are also available for clients with the Project Management, Time & Effort, and Fund Management add-on modules, and Recipient Access Licenses.

Contents

AmpliFund Reports 1
Pre-Award Reports 1
Post-Award Reports 2
Recipient Reports 3
Project Reports 4
Time & Effort Reports 4
Fund Reports 5
Federal Reports 5

Pre-Award Reports

Pre-Award reports support award status, organization, staff allocation, and submission budget and performance plan reporting.

Report	Description
Award Status Report	The Award Status Report provides an overview of the entire grant portfolio including the grant solicitation success rate by dollar and by unit for a fiscal year. The report can be filtered by Grantors, Grantor Types, Grant Writers, and Departments.
Organization Roster	The Organization Roster report provides a list of members associated with an organization.
Relationship Report (By Organization)	The Relationship Report (by organization) provides a list of all Staff members who have relationships with individuals at an organization.
Relationship Report (By Staff Member)	The Relationship Report (by staff member) provides a list of all external individual relationships for a Staff member. The report is grouped by organization.
Staff Allocation Detail Report	The Staff Allocation Detail Report provides a Staff member's percent of time and salary amount allocated to approved and pending grants for a specified time period.

Staff Allocation Overview Report	The Staff Allocation Overview Report provides Staff members' percent of time and salary amount allocated to approved and pending grants for a specified time period.
Submission Budget Narrative Report	The Submission Budget Narrative Report provides a grant's budget narrative (description) for all submission budget line items.
Submission Budget Report	The Submission Budget Report provides a grant's pre-award submission budget by fiscal year, including match data.
Submission Performance Plan Report	The Submission Performance Plan Report provides a grant's submission performance plan.

Post-Award Reports

This set of reports provides access to a variety of Post-Award reports including: award status, employee activity, budget variance reporting, expense reporting, and sub-award reporting.

Report	Description
Award Status Report	The Award Status Report provides an overview of the entire grant portfolio including the close out date, spend-down percent, program performance by percent, and length of award in months for a specified time period. The report can be filtered by grantor, grantor type, grant manager, department, and subject.
Employee Activity Report	The Employee Activity Report provides a list of an employee's tasks and status, budget activity including variance and spend down, and performance activity status for a specified time period.
GL Account Detail	The GL Account Detail report provides a list of budget line items applied to a selected GL code for a specified time period.
GL Account Overview	The GL Account Overview report provides a list of applied GL actuals by GL Code for a specified time period. The report includes actual amount per GL Code, the total actual amount for the GL account, and the sum of all actuals.
Grant Budget Variance Report	The Grant Budget Variance Report provides a grant's variance between the planned grant budget and submitted expenses for a specified time period. The report includes variance amount, variance percentage, and spend-down percentage for each budget line item.
Grant Line Item Expense Report	The Grant Line Item Expense Report provides a grant's list of expenses entered against budget line items for a specified time period. The report includes expense date, line item, submitted by, description, and amount.

Grant Line Item Expense Report By Line Item	The Grant Line Item Expense Report By Line Item provides a list of expenses entered against a selected budget line item for a specified time period.
Grant Performance Variance Report	The Grant Performance Variance Report provides a grant's variance between the planned performance plan goals and submitted achievements for a specified time period. The report is grouped by goal type.
Overall Grant Variance Detail Report	The Overall Grant Variance Detail Report provides a grant's budget spend-down percentage and/or performance goal status. The report shows information per line item and/or goal, and overall total spend-down and on-target percentages.
Overall Grant Variance Report	The Overall Grant Variance Report provides a list of all grants with the selected status. The report includes grant start date, length in months, spend-down percentage, and performance percentage.
Unit Goal Detail Report	The Unit Goal Detail Report provides goal performance variance across multiple grants for a specified time period.

Recipient Reports

For clients with Recipient Access Licenses

Report	Description
Recipient Grant Budget Variance Report	The Recipient Grant Budget Variance Report provides an award's or sub-award's variance between the grant's planned budget and expenses and those submitted by the recipient for a specified time period. The report also includes line item spend-down percentages.
Recipient Performance Variance Report	The Recipient Performance Variance Report provides an award's or sub-award's variance between planned performance goals and achievements for a grant for a specified time period. The report is grouped by goal type.
Sub-Award Overall Grant Variance Detail	The Sub-Award Overall Grant Variance Detail report provides a sub-recipient's budget spend-down percentage and/or performance goal status. The report shows information per line item and/or goal, and total spend down and on-target percentages.
Sub-Award Overall Variance (By Grant)	The Sub-Award Overall Variance (By Grant) report provides overall grant performance for all sub-recipients of a grant. The report includes sub-award start date, length in months, awarded amount, budgeted amount, actual amount, spend-down percentage, and performance percentage.
Sub-Award Overall Variance (By Sub)	The Sub-Award Overall Variance (By Sub) provides a sub-recipient's overall grant performance for all sub-awards. The report includes sub-award start date, length in months, awarded amount, budgeted amount,

	actual amount, spend-down percentage, and program performance percentage.

Project Reports

For clients with the Project Management module

Report	Description
Individual Project Report	The Individual Project Report provides a project's budget spend-down percentage by line item and performance percentage by goal.
Project Budget Report	The Project Budget Report provides a project's budget by fiscal year.
Project Budget Variance Report	The Project Budget Variance Report provides a project's variance between the planned budget and actual expenses for a specified time period. The report also includes spend-down percentages.
Project Funding Detail Report	The Project Funding Detail Report provides a project's funding percentage by project line item. The report is grouped by line item type.
Project Funding Overview Report	The Project Funding Overview Report provides a list of all projects after a selected date. The report includes project start date, length in months, project manager, budgeted amount, funded amount, unfunded amount, and funded percentage.
Project Performance Plan Report	The Project Performance Plan Report provides a list of a project's planned performance goals. The report groups goals by goal type.
Project Performance Variance Report	The Project Performance Variance Report provides a project's variance between the planned performance goals and achievements for a specified time period. The report groups goals by goal type.

Time & Effort Reports

For clients with the Time & Effort Certification module

Report	Description
Time and Effort Certification Report	The Time and Effort Certification Report provides an employee's time and effort summary for a specified time period. This document can be signed and certified by the employee's supervisor.
Time and Effort Detail Report	The Time and Effort Detail Report provides an employee's completed effort, remaining effort, and total hours and salary for a specified time period. The report is grouped by funded and unfunded time and effort. The report includes grant and project name, planned and actual hours, planned and actual percentage, planned and actual dollar amount, remaining hours

	allocated, remaining percentage allocated, remaining amount allocated, and total hours and salary.
Timesheet Status Report	The Timesheet Status Report provides a department's employees timesheet summary for a selected month. The report includes employee and grant/project, submitted status, submitted date, approved status, approved date, certified status, certified date, total hours, compliant, and supervisor.

Fund Reports

For clients with the Fund Management module

Report	Description
Fund Income Detail	The Fund Income Detail report provides a funding source's list of all credit transactions for a specified time period. The report includes fund name, payment date, payment reference number, and amount.
Fund Income Overview	The Fund Income Overview report provides a fund's list of all funding sources and the total income provided for a specified time period.
Grant Funding Report	The Grant Funding Report provides a list of all awards given from a fund.
Opportunity Scoring Report	The Opportunity Scoring Report provides a list of all scores for an opportunity. The report can be organized by field name or reviewer. The report includes form name, field type, scoring category, field name, field response, scoring scale, reviewer name, field score, final score, and final comments.

Federal Reports

Report	Description
FFATA Report	The FFATA Report provides a report that meets the requirements for the Federal Funding Accountability and Transparency Act.
SF-425 Report	The SF-425 Report provides information required to complete the Federal SF-425. The SF-425 provides recipients of grants and cooperative agreements a standard format for reporting the financial status of their awards.

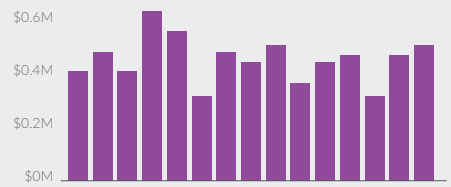
	Organizational Admin	Executive	Department Admin	Department User (Salary)	Department User (No Salary)	Project Admin	Project User (Salary)	Project User (No Salary)	Fund Admin	Fund User (Salary)	Fund User (No Salary)
Project Management*											
Projects*	Create Edit View all	View all	Create Edit View linked	Edit View	Edit View	Create Edit View all	Create Edit View	Create Edit View			
Fund Management*											
Funds*	Create Edit View all	View all							Create Edit View all	Create Edit View	Create Edit View
Opportunities*	Create Edit View all	View all							Create Edit View all	Create Edit View all	Create Edit View all
Awards*	Create Edit View all	View all							Create Edit View all	Create Edit View all	Create Edit View all
Documents											
Administrator	Create Edit View all	View all									
Funds*	Create Edit View all	View all							Create Edit View all	Create Edit View	Create Edit View
Grants	Create Edit View all	View all	Create Edit View linked	Create Edit View linked	Create Edit View linked	Create Edit View linked	Create Edit View	Create Edit View	Create Edit View	Create Edit View	Create Edit View
Individuals	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Organizations	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all
Projects*	Create Edit View all	View all	Create Edit View linked	Create Edit View	Create Edit View	Create Edit View all	Create Edit View	Create Edit View			
Public	Create Edit View all	View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all	Create Edit View all

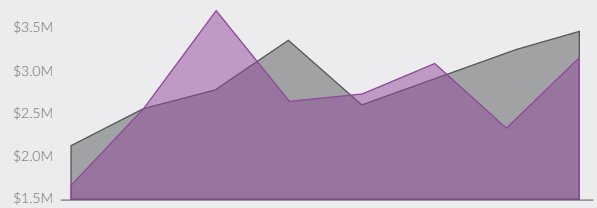
Exhibit E
Custom AmpliFund Reports

Discover meaningful insights using built-in business intelligence tools

Dashboards & Visualizations

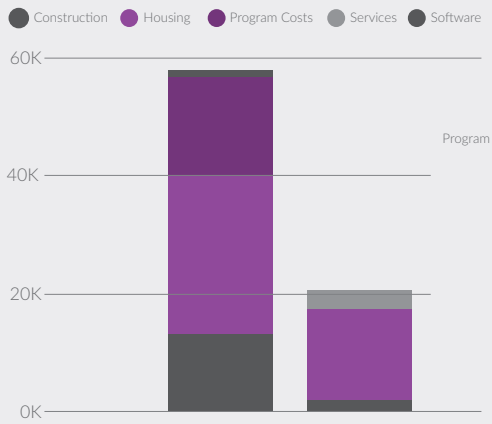
Utilize impactful dashboards featuring up-to-date grant data in interactive visualizations, such as bar charts, line charts, pie charts, tables, matrices, and maps.

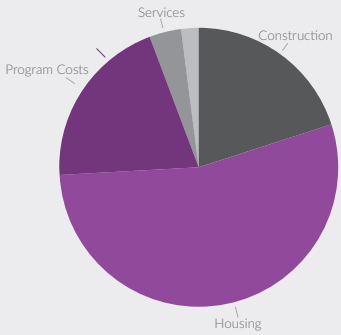


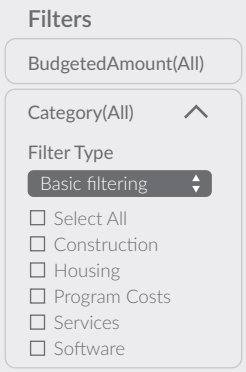


Custom Reports

Design and create custom reports using a diverse array of data visualizations on demand using organizational data in AmpliFund.







Pre-Built Reports

Choose from an extensive library of pre-built reports, each containing configurable input parameters and a highly interactive report viewer that allows for selecting, filtering, and exporting underlying data.

Grant Budget Variance Report

	Budgeted Grant Funded Amount	Budgeted Cash Amount	Budgeted In Kind Match
Non Personnel			
Counseling Expenses	$950,000.00	$0.00	$0.00
Educational Materials	$10,000.00	$0.00	$0.00
Equipment	$1,300,000.00	$0.00	$0.00
Facilities	$200,000.00	$0.00	$0.00
Medical Expenses	$260,000.00	$0.00	$0.00
Professional and Outside Services	$200,000.00	$0.00	$0.00
Technology	$50,000.00	$0.00	$0.00
NonPersonnel Sub Totals	$2,970,000.00	$0.00	$0.00

Powered by Microsoft Power BI

9340 E. Redfield Road | Unit 1073 | Scottsdale, AZ 85260

Cheryl A. Weiner, MBA, GPC

CWeiner@TWBGrants.com | 602-999-2782

Profile

Seasoned and respected professional with 30-plus years of management experience in non-profit, healthcare, and corporate sectors, Strategic planner with the ability to identify long-term goals and define strategies to attain those goals. Expert facilitator in engaging diverse stakeholders to achieve a common goal. Skilled written and oral communicator with exemplary facilitation skills. Respected professional who works well independently as well as within a team framework. Advocate for ethical behavior and transparency in all actions.

Professional Experience

The Writer's Block, LLC | Phoenix, AZ 2009-Present
Founder/President

Consultant to the nonprofit and for-profit sectors, primarily in metropolitan Phoenix, providing prospect research, proposal writing, and grants management services.

Key Accomplishments:

- Secured over $9.8 Million in funding from prestigious and highly competitive local and national foundations, corporations, and government agencies for client organizations
- Responsible for developing more than 150 clinical and administrative standard operating procedures needed for national specialty pharmacy network to successfully submit application to obtain URAC accreditation
- Successfully completed extensive testing to receive credentials from the Grant Professional Certification Institute™ (GPCI); One of only 15 GPCI-certified grant professionals in Arizona

Grantors include but are not limited to:

- Social Innovation Fund, the Corporation of National and Community Service (co-author)
- Robert Wood Johnson Foundation
- Federal Home Loan Bank of San Francisco
- Diane & Bruce Halle Foundation
- Nina Mason Pulliam Charitable Trust
- Bayer Healthcare Pharmaceuticals (valued at $2,000,000 in revenue annually)
- Biomedical Advanced Research and Development Authority, U.S. Department of Health and Human Services
- U.S. Department of Education
- Bob & Renee Parsons Foundation
- BHHS Legacy Foundation
- Virginia G. Piper Charitable Trust
- GlaxoSmithKline (valued at $6,000,000 in revenue annually)

Client organizations include U.S. Soccer Foundation, Scottsdale Clinical Research Institute, Arizona Housing Inc., Central Arizona Shelter Services, the Society of St. Vincent de Paul, Assistance League of Phoenix, Raising Special Kids, New Pathways for Youth, Phoenix Youth Symphony, and Avella Specialty Pharmacy.

Altered Tails, Inc. | Phoenix, AZ 2008
President & CEO

Leader of nonprofit organization dedicated to providing affordable spay/neuter services to the community.

Key Accomplishments:

- Surpassed organization's six-month goals for number of sterilizations of companion animals and free-roaming feral cats
- Directed the successful merger of two culturally-disparate nonprofit animal welfare organizations

- Secured building donation to transition operations from a mobile to stationary clinic
- Raised over $500,000 in individual contributions and foundation grants to renovate the building
- Chaired annual fundraising gala with 100% net increase in revenue over prior year's event

Southwest Center for HIV/AIDS (formerly Body Positive) | Phoenix, AZ 2006 –2008
Director of Programs

Administered 19 HIV/AIDS prevention, education and outreach programs targeted to individuals of all ages, genders, sexual orientations, and ethnicities. Managed and coached a staff of 17 social workers, nurses, and community outreach specialists to engage community members to reduce HIV transmission and connect HIV+ individuals to services. Directed the Kirk D. Baxter Wellness Center of Naturopathic Medicine, which provided complementary and alternative therapies to over 1,600 clients annually. Supervised four Master-level social workers who provided over 2,000 counseling sessions annually in the behavioral health clinic.

Key Accomplishments:

- Secured and managed 20 grant awards totaling nearly $1.2 Million to support programs
- Met or exceeded all program objectives as outlined in grant applications and awards
- Successfully managed three-agency collaborative prevention program funded by the Substance Abuse and Mental Health Services Administration (SAMHSA)

NAMI Arizona | Phoenix, AZ 2005 – 2006
Executive Director

Directed all aspects of National Alliance on Mental Illness of Arizona operations. Coordinated individual and state advocacy efforts with 10 state local affiliate organizations. Researched and submitted grant proposals to support organization's goals and growth.

Key Accomplishments:

- Created and launched a new website to serve as a resource for the community and to heighten awareness of the organization and its mission and programs
- Increased corporate sponsorship of annual NAMIWalks fundraising event by 25%
- Chaired annual Mystery Authors Luncheon with net proceeds in excess of $70,000, a 40% increase over previous year
- Submitted and received three grants totaling $85,000 in first four months as executive director

Additional Experience:
Arizona Animal Welfare League, AZ; CVS Health (Previously PCS Health Systems), AZ; St. Luke's Medical Center, AZ; Beth Israel Hospital, MA; American Red Cross, MA; Damon Corporation, MA; Haemonetics Corporation, MA.

EDUCATION

Master of Business Administration, Healthcare Administration
University of Phoenix

Bachelor of Science
University of Massachusetts

CREDENTIALS, SERVICES AND AFFILIATIONS

Grant Professional Certified — Grant Professionals Certification Institute, 2009
Medical Technologist, Registration # 18307 — American Society of Clinical Pathologists
Ethics Committee Member, Grant Professionals Association — 2010 – Present
Secretary, Arizona Founding Chapter- Grant Professionals Association — 2011 - 2013
Board Member, Arizona Family Health Partnership — 2010 - 2011
Grant Professional Certificate Institute Essay Reviewer — 2012 - Present

AmpliFund Implementation Process

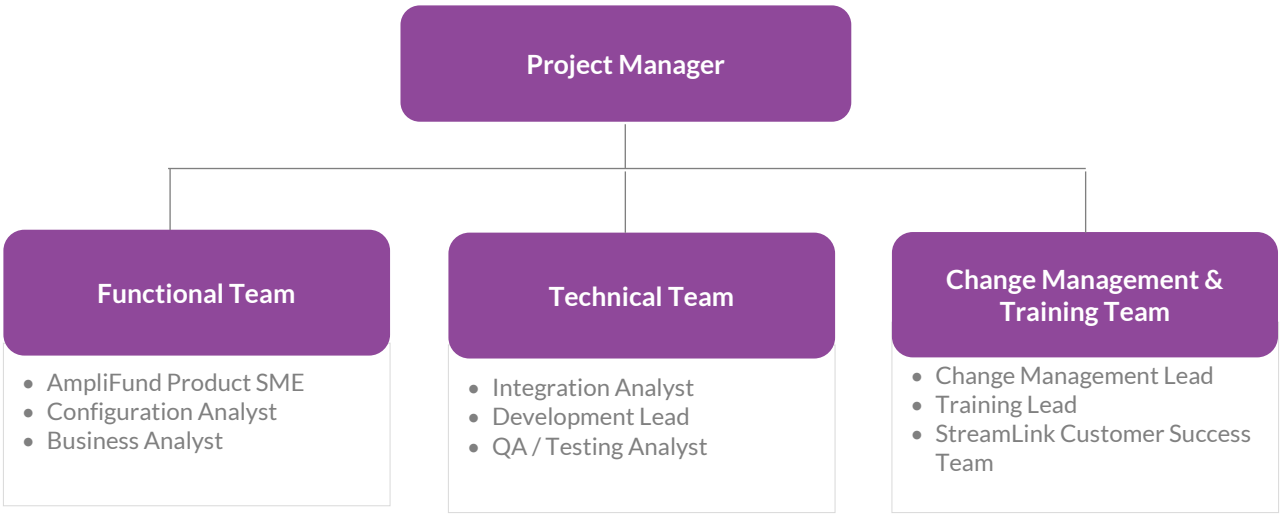
This document provides an overview of the **AmpliFund Implementation Process**. Implementations include a series of seven phases: Initiation, Planning, Analysis, Configuration, Testing, Migration, and Go-Live. At the beginning of the implementation process, StreamLink's Implementation Team conducts business process and gap analysis workshops to identify how a client's needs and current processes map to the features and functionality of AmpliFund modules. Identified gaps are documented and reviewed with AmpliFund's Product Team to determine how to effectively address functional gaps. Through this iterative process with our clients, StreamLink's team is continually incorporating enhancements into AmpliFund's suite of product modules.

The **AmpliFund Implementation Process** is built on a foundation that draws techniques from both waterfall and agile methodologies. This combination of techniques allows our teams the flexibility to adjust their approach to best fit a client's implementation scenario. A collaborative process with our clients is the key to success. In order to manage client implementations, our teams use PMBOK best practices along with templates and tools to deliver a consistent client experience. Our teams work in an integrated fashion to maximize communication and deliver results for our clients in a professional manner.

StreamLink Implementation Team Structure and Roles

Implementation Team Structure

Implementation Team structure and roles may vary based on the needs of the client and the size of the engagement. However, the following roles are typically part of our team structure.



Implementation Team Roles

Role	Description
Project Manager	• Responsible for planning, organizing, managing, directing and communicating on all AmpliFund project phase tasks • Works with client provided resources to conduct requirement workshops • Develops and maintains ownership of AmpliFund project plan • Prepares weekly project status reports and facilitates weekly status meetings • Works closely with AmpliFund Implementation Team to confirm that client needs and phase required deliverables and tasks are completed in accordance with the client's requirements

Role	Description
AmpliFund Product SME	• Serves as AmpliFund functional expert • Attends and actively participates in all requirement workshops • Works with Business Analyst to ensure that findings and outcomes of business requirement workshops are properly documented specifically noting functionality gaps between base system functionality and requirements confirmed as product enhancements • Completes design of functional enhancements • Works with Configuration Analyst to ensure that AmpliFund is configured to maximize system functionality
Configuration Analyst	• Attends and actively participates in all requirement workshops • Works closely with the AmpliFund Product SME to document configuration requirements • Documents mapping of requirements to AmpliFund base and configurable system functionality • Notes any areas identified as functional enhancements • Works with Business Analyst to confirm updates to Requirements Traceability Matrix including cross references as appropriate to configuration and functional enhancements • Supports testing efforts from a functional perspective • Assists QA / Testing Analyst with development of UAT test scripts and scenarios • Configures AmpliFund functionality per client's requirements in preparation for Testing Phase • Documents AmpliFund configuration • Provides AmpliFund functional expertise to support client provided UAT functional testers • Works with Change Management Lead and Training Lead to complete knowledge transfer activities
Business Analyst	• Attends and actively participates in all requirement workshops • Responsible for documenting all findings and outcomes of requirement workshops • Work with AmpliFund Product SME to identify and document functional gaps • Builds and maintains Requirements Traceability Matrix • Leverages functional expertise of Configuration Analyst to update Requirements Traceability Matrix with cross references as appropriate to configuration and enhancements • Builds and maintains enhancement tracking log
Integration Analyst	• Attends and actively participates in all requirement workshops • Documents legacy data mapping to AmpliFund data fields • Documents all integration points between AmpliFund and client systems • Works with client resources to answer questions regarding the AmpliFund Open API • Owns development of legacy data migration and data integration test scripts and scenarios
Development Lead	• Works with AmpliFund Product SME, Business Analyst, and Configuration Analyst to understand requirements of functional enhancements • Codes functional enhancements per design requirements
QA / Testing Analyst	• Owns development of UAT test scripts and scenarios • Prepares and manages testing schedules • Conducts testing • Documents any issues identified during testing and provides results to appropriate project team personnel for resolution • Works with Business Analyst, Configuration Analyst, and Integration Analyst to confirm that system is meeting all functional and technical requirements
Change Management Lead	• Manages overall execution of change management and communication strategies/plans • Drafts stakeholder communications determined to be relevant during each phase of the project per the communication plan • Monitors and updates stakeholder readiness
Training Lead	• Creates and maintains training strategy and knowledge transfer plan • Designs and builds instructor guides, course curriculum, training materials, and job aids • Works with Configuration Analyst to configure AmpliFund functionality per client's requirements in preparation for training • Leads the train-the-trainer sessions for client training resources
StreamLink Customer Success Team	• Post implementation support is provided by the StreamLink Customer Success Team • Client personnel and recipients submit support tickets via the StreamLink Support Portal

Client Implementation Team

Client Implementation Team Roles

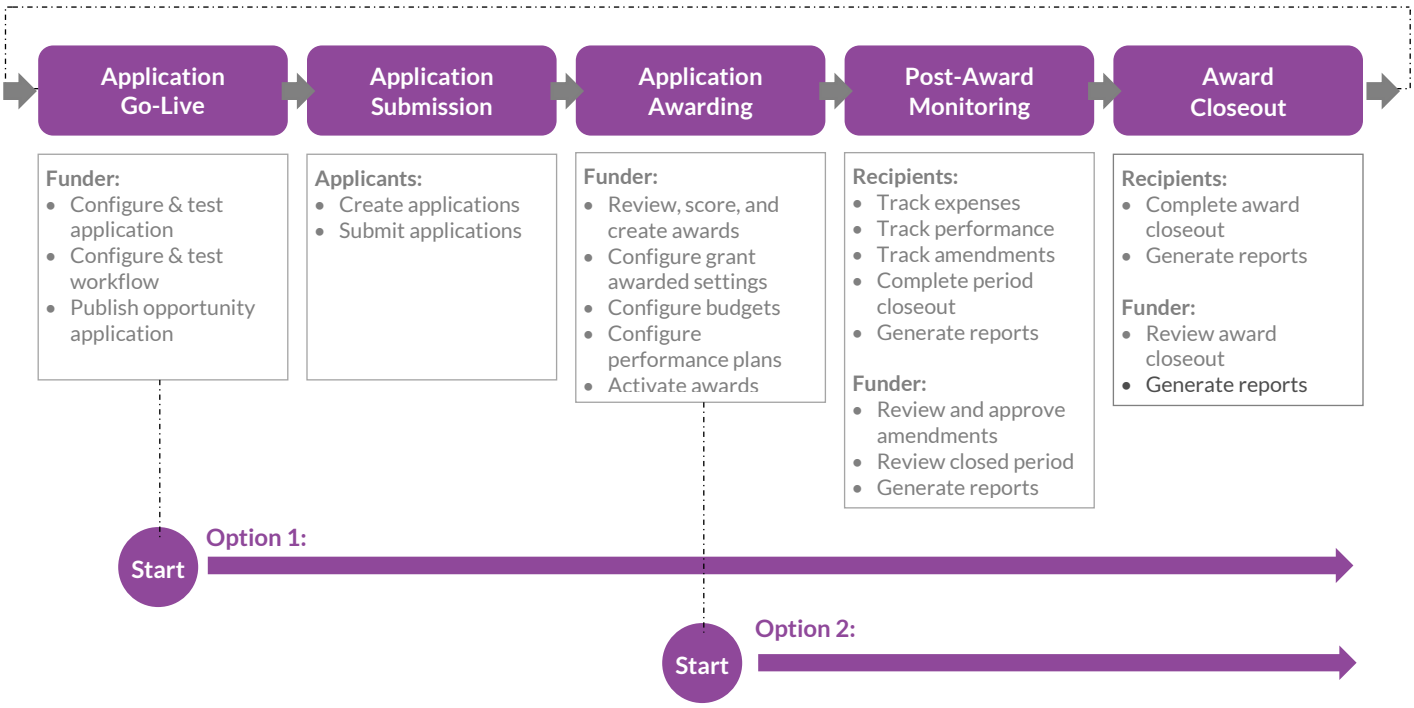
A client's implementation team roles may vary based on the needs of the client and the size of the engagement. However, the following roles are typically part of a client's implementation team structure.

Role	Description
Project Manager	• Provides leadership and project management • Serves as the main point of contact to coordinate project activities, tasks, deliverables, and client resources • Provides direction to client resources • Responsible for managing daily project activities and schedule • Monitors project status and redirects priorities and client resources as needed
Functional Lead(s)	• Provides subject matter expertise on client grant processes • Provides subject matter expertise on client day-to-day grant management activities • Attends and actively participates in all requirement workshops • Validates requirement workshop outcomes and gap analysis results • Assists with system configuration • Participates in the development of user acceptance test cases and scenarios • Executes UAT • Develops AmpliFund subject matter expertise through knowledge transfer
Data Migration / Integration Lead(s)	• Attends and actively participates in all requirement workshops • Works with AmpliFund Integration Analyst to complete legacy data mapping tasks • Prepares all necessary load files for legacy data • Works with AmpliFund Integration Analyst to prepare and validate legacy data mapping documentation • Works with AmpliFund Integration Analyst to prepare and validate data integration documentation • Builds data integrations to client systems using AmpliFund API • Participates in the development of legacy data migration and data integration test scripts and scenarios • Works with AmpliFund Integration Analyst to conduct legacy data migration and data integration testing • Develops AmpliFund subject matter expertise through knowledge transfer
Organizational Change Management Lead	• Creates and manages overall execution of change management and communication strategies/plans • Creates and manages communication strategy • Work with the project manager, key leaders and project teams to integrate change management activities into the overall project plan • Works with StreamLink Change Management Lead to draft stakeholder communications determined to be relevant during each phase of the project per the communication plan • Approves all communication materials • Monitors and updates stakeholder readiness
Training Lead	• Works with StreamLink Training Lead to create and maintain training strategy and knowledge transfer plan • Provides sign-off on training strategy and knowledge transfer plan • Works with StreamLink Training Lead to design and build instructor guides, course curriculum, training materials, and job aids • Manages additional client resources involved with designing and building client specific training materials to ensure completion of their project responsibilities • Tracks training project tasks and identified issues • Coordinates and organizes train-the-trainer sessions for client training resources • Develops AmpliFund subject matter expertise through knowledge transfer
Trainer(s)	• Supports Training Lead with the design and development of client specific training materials • Develops AmpliFund subject matter expertise through knowledge transfer • Facilitates training sessions for the client's AmpliFund users

AmpliFund Implementation Methodology

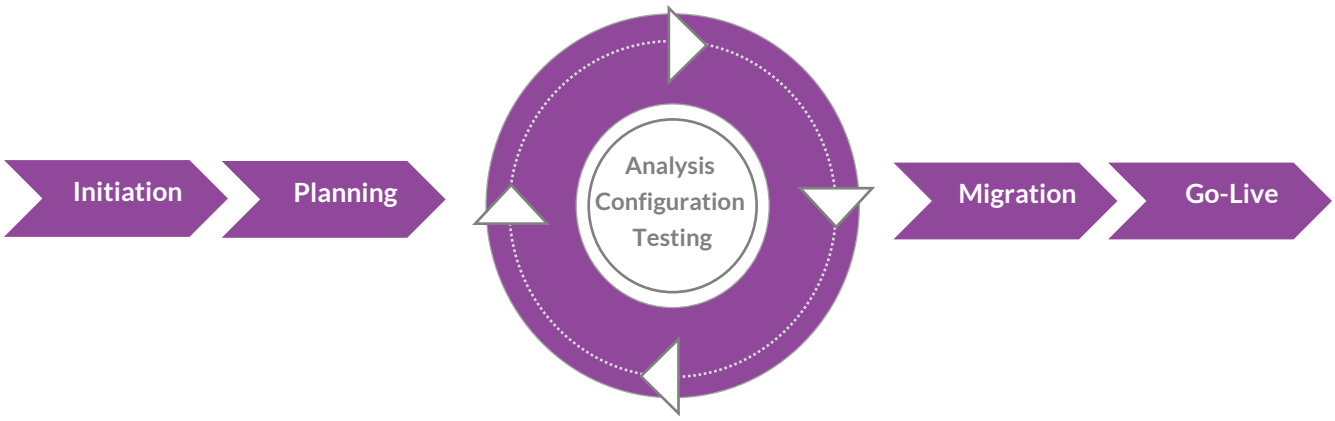
Implementation Methodology

The **AmpliFund Implementation Methodology** is flexible and may be adjusted to account for the point in the grant management lifecycle at which the client wants to begin using AmpliFund. For example, the implementation process could begin with a focus on either (1) application go-live or (2) application awarding.



Implementation Phases

The **AmpliFund Implementation Methodology** includes a series of seven phases: Initiation, Planning, Analysis, Configuration, Testing, Migration, and Go-Live. At the core of the methodology is an iterative approach to the Analysis, Configuration, and Testing phases. This approach enables the project team to focus first on areas of a client's implementation which are identified as the highest priorities. Since AmpliFund is a SaaS product, the implementation focuses on analyzing processes rather than designing code which enables our team to support a quicker implementation cycle.



The seven phases of the **AmpliFund Implementation Methodology** are described below along with key activities and deliverables typically associated with each phase of an implementation.

Phases	Key Activities	Key Deliverables
Phase 1: Initiation The StreamLink Implementation Team conducts a client kickoff meeting to introduce the project teams, review project scope, establish key dates in the project timeline, set expectations, assign initial tasks, and answer any initial questions.	• Conduct kick-off meeting • Review project scope established during contract negotiations • Establish critical project dates based on project scope	1. Kick-off meeting materials 2. High-level project timeline 3. AmpliFund account set-up form
Phase 2: Planning The StreamLink Implementation Team works closely with the client to clarify all aspects of the project. Once the scope is clearly defined, key milestone dates are established and serve as the basis of the project schedule. Following review and approval of the key milestones, a project plan is built. The project's status meeting cadence is set based on implementation complexity.	• Develop project management plan (PMP) and PMP sub-plans • Finalize project staffing • Identify project stakeholders (both internal and external) • Develop communication plan	1. Project team contact list 2. Project team roles and responsibilities 3. Project plan summary 4. Scope management plan 5. Project plan 6. Resource plan 7. Stakeholder analysis 8. Communication plan 9. Change control approach 10. Issue tracking log
Phase 3: Analysis The StreamLink Implementation Team works closely with the client to review and document the scope of the project's requirements. This includes detailed discussions regarding business process and gap analysis, AmpliFund master data elements, user roles, and security. Based on the modules a client is implementing, working sessions to discuss lead and sub-recipient functionality, workflow, competitive award management, and API integrations may also be needed. The client will sign-off on all documented requirements.	• Conduct business process and gap analysis workshops • Document workshop findings • Document scope changes (if applicable) • Map legacy system data extracts to AmpliFund data fields (if applicable) • Conduct API data integration analysis (if applicable) • Begin drafting configuration and integration documents • Conduct training audience analysis • Develop training strategy • Develop knowledge transfer plan • Execute communication plan tasks	1. Requirements and process analysis plan 2. Gap analysis 3. Legacy data mapping analysis 4. Integration points analysis 5. Project scope revisions 6. Requirements traceability matrix 7. Enhancement tracking log 8. Training strategy 9. Knowledge transfer plan
Phase 4: Configuration The StreamLink Implementation Team configures the client's instance of AmpliFund according to the approved business and system requirements. Configuration is completed in conjunction with client resources to assist with the knowledge transfer process.	• Complete system configuration associated with relevant modules in test environment • Build functional enhancements • Migrate legacy data • Build data integrations via AmpliFund API (if applicable) • Develop user acceptance testing (UAT) strategy and scenarios • Develop legacy data testing strategy and scenarios • Develop data integration testing strategy and scenarios • Create testing master plan and schedules • Design training curriculum and materials • Execute communication plan tasks • Execute knowledge transfer plan tasks	1. Configuration documents 2. Integration documents 3. Legacy data mapping plan 4. Integration points plan 5. Data conversion and integration report 6. Configured test environment 7. Testing strategies for UAT, legacy data migration, and data integration 8. Testing scenarios for UAT, legacy data migration, and data integration 9. Testing master plan and schedules for UAT, legacy data migration, and data integration 10. Training material drafts

Phases	Key Activities	Key Deliverables
Phase 5: Testing Client resources are involved in the testing phase to ensure that the configured solution meets the client's needs. During the Testing phase, the client reviews and signs-off on the application configuration. Following the configuration sign-off, training materials are finalized and train-the-trainer sessions are conducted.	• Conduct testing of functional enhancements • Manage and track UAT, legacy data, and data integration testing • Execute UAT, legacy data, and data integration testing • Document UAT, legacy data, and data integration testing results • Develop, update, and maintain migration checklist • Prepare for configuration and data migration to production site • Conduct train-the-trainer sessions • Execute communication plan tasks • Execute knowledge transfer plan tasks	1. Functional enhancements test results 2. UAT results 3. Legacy data test results 4. Data integration test results 5. Training materials 6. Train-the-trainer sessions
Phase 6: Migration Approved configuration is migrated from the test environment to the client's Production instance of AmpliFund in preparation for Go-Live.	• Complete configuration migration tasks • Complete data migration tasks • Execute communication plan tasks • Execute knowledge transfer plan tasks	1. Configuration migration checklist 2. Data migration checklist
Phase 7: Go-Live End user training is conducted and users begin working in AmpliFund.	• Complete production go-live readiness tasks • Confirm that deployment to production site is complete • Conduct end user training • Finalize project documents • Conduct knowledge transfer sessions • Complete transition plan tasks • Complete project close-out tasks and report • Secure final client sign-off • Transition client to post implementation support	1. Go-live readiness and production deployment checklist 2. Configured production environment 3. End user training sessions 4. Final training materials 5. Final knowledge transfer plan 6. Final requirements traceability matrix 7. Final enhancement tracking log 8. Final issue tracking log 9. Final configuration documents 10. Final integration documents 11. Final test cases (UAT, legacy data, and data integration) with testing results 12. Knowledge transfer sessions 13. Transition plan 14. Project close-out report 15. Client project sign-off

Staffing Model by Project Phase

The specific staffing model for each implementation varies based on size of the engagement. However, the following roles are typically involved in project phases as noted below.

Roles	Phases						
	1: Initiation	2: Planning	3: Analysis	4: Configuration	5: Testing	6: Migration	7: Go-Live
StreamLink Team Roles							
Project Manager	x	x	x	x	x	x	x
AmpliFund Product SME	x	x	x	x	x	x	x
Configuration Analyst	x	x	x	x	x	x	x
Business Analyst	x	x	x	x	x		
Integration Analyst			x	x	x	x	
Development Lead			x	x	x	x	
QA / Testing Analyst				x	x	x	
Change Management Lead	x	x	x				x
Training Lead	x	x	x	x	x	x	x
StreamLink Customer Success Team							x
Client Team Roles							
Project Manager	x	x	x	x	x	x	x
Functional Lead(s)	x	x	x	x	x	x	x
Data Migration / Integration Lead(s)			x	x	x	x	
Organizational Change Management Lead	x	x	x				x
Training Lead	x	x	x	x	x	x	x
Trainer(s)				x	x	x	x

Risk and Cost Management

StreamLink recognizes the importance of managing project risk and cost. In order to manage these critical elements of client engagements, our team works to proactively identify and mitigate risks that can impact project cost by closely tracking project scope, time, and issues.

Scope: At the start of a client engagement, the AmpliFund Implementation Team meets with StreamLink business development resources involved with contract negotiations to review and discuss all elements of project scope included in a contract. The understanding of scope is reviewed again with the client's team members during the Kick-Off Meeting as part of the Initiation phase of the project. We believe that a mutual and clear understanding of the project scope, team roles and responsibilities, and associated deliverables is a key factor for project success. Any changes or additions to scope are analyzed to determine both the associated costs and benefits for the client.

Time: A detailed plan (schedule) is developed during the Planning phase of the project. Variances from the planned schedule are reviewed during project status meetings, and options for addressing the variances are discussed. The project schedule is adjusted as needed during the course of the project lifecycle to account for any changes to the original project scope.

Issues: As part of our standard project management practices, our team develops an Issues Tracking Log during the Planning phase of a project. This log is maintained throughout the project lifecycle. Our team works collaboratively to review issues and determine solutions. When appropriate, issues are escalated to leadership both on the StreamLink team and the client team. The Issue Tracking Log is reviewed during project status meetings in order to inform the broader project team of current open issues affecting the project.

Cost: Our team works with a client to develop a mutually agreed upon format for reporting on project cost versus budget. As part of the reporting process and format, we take into account all associated contractual obligations including tasks, performance measures, and financial consequences.

Risk: Our team works collaboratively with clients to identify and discuss project risks. While we attempt to proactively anticipate and discuss risks with our clients, our team recognizes that unanticipated risks may arise at any point in the implementation process. During the Initiation phase of our projects, we begin working with a client to identify and discuss potential project risks; we view these discussions as an active dialogue with our clients that spans the entire project lifecycle.

Diligently tracking project scope, time, and issues enables our teams to effectively manage and report back to clients on project cost and risk. Project status reports include a **Project Management Metrics** section in which scope, time, issues, cost, and risk are emphasized. These critical project elements are highlighted during status meetings, items of concern are reviewed, and options for remediation are discussed.

Example: Project Status Report - Project Management Metrics Section

Project Management Metrics	Notes	Risk	Cost
Scope	Client has requested to add two additional funding opportunities and applications to the project scope. Cost proposal for the additional scope have been provided to the client and are pending approval.		x
Time	The requested change to scope noted above will need to be factored into the project timeline if the cost proposals are approved by the client. There may be some risk associated with the timing as key client personnel involved with workflow design have limited availability over the next three weeks.	x	
Issues	None at this time		

Collaboration with Clients and Partners

Adapting Our Process

StreamLink Software follows a set of standard practices on client engagements. However, we recognize that each client may have its own standards and methodology. We are committed to working with clients and partners to utilize an approach that best meets a client's needs.

Exhibit H – Preliminary Project Plan

The preliminary project plan has been included within Section IX, pages 102-112.

© StreamLink™ Software

Exhibit I - Select AmpliFund Government Clients

Federal

RATB

Federal Veterans Affairs

Federal EPA

State

State of Missouri

State of Utah

State of Nevada

State of Illinois

County & City

Richmond County

Henderson County

Mecklenburg County

City of Jacksonville

Maui County

Kauai County

City of Milwaukee

AmpliFund Public Sector

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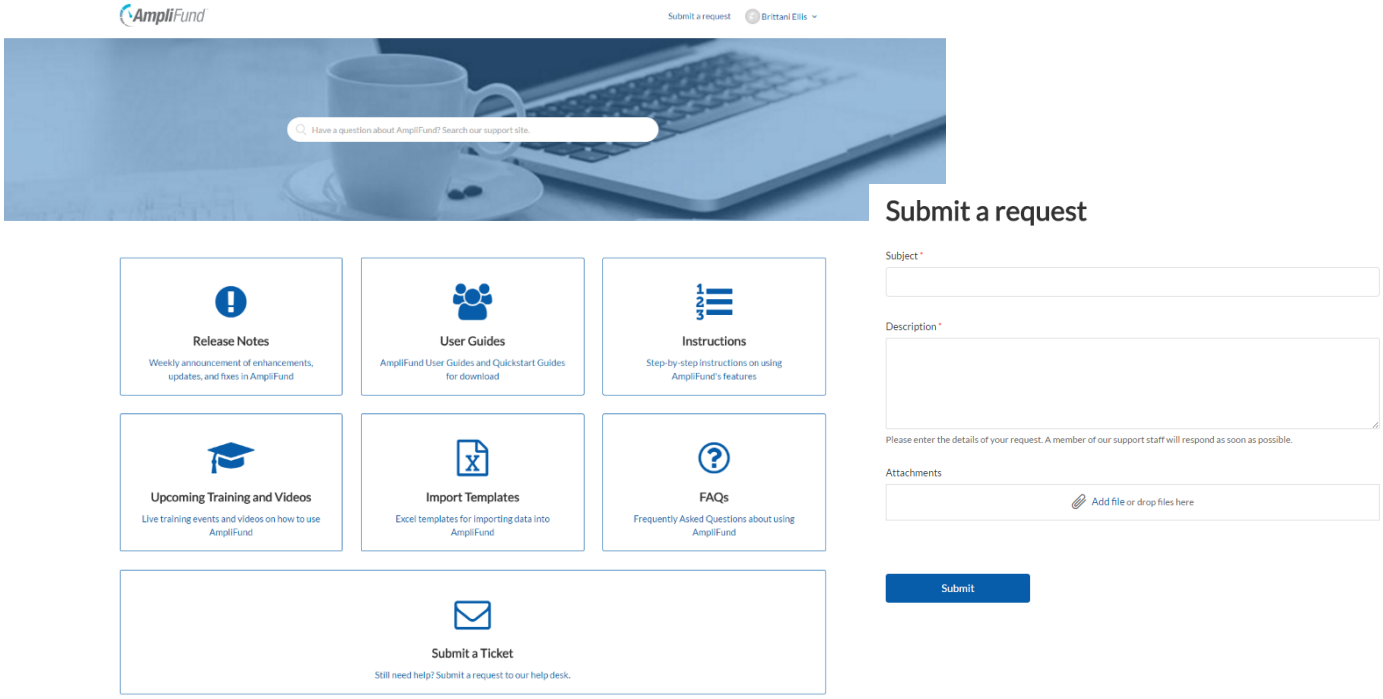
AmpliFund Technical Support Details

StreamLink Software supports all AmpliFund clients throughout the life of their contract. This includes:

Tier I Technical Support:

Available online 24 hours a day, 7 days per week for user guides, training videos, customer support tickets, bug reporting, and feature requests via our AmpliFund Support Site.



Tier II Technical Support:

Available from 8:00am – 8:00pm ET, Monday through Friday. Involves live communication with support agents; phone calls will be answered or returned in the same business day (usually within one hour of receipt).

Tier III Technical Support:

In the event that an issue cannot be resolved immediately with Tier II Support, a defect report is filed. If a work-around is not available, defect resolution is escalated to the highest level.

Additional Support:

After initial implementation, regularly scheduled virtual training sessions are available for all users. Training materials are also available at any time via the StreamLink Software online support portal. Materials provided include process-specific help documentation, FAQs, and short tutorial videos.

Exhibit K - AmpliFund Change Request Form

RFP Deliverables

This form is intended to be used to facilitate the StreamLink CMP. As a reminder, the CMP includes the following steps: 1.Create Change Request - This is done by completing fields is sections 1-3 below 2. Review Change Request - The Project Stakeholders identified in Section 2 complete review 3. Approve/Deny Change Request - Approvers identified in Section 3 approve or deny 4. Complete Change Request - If approved, the project team shall complete the Change as documented	**4.5.2.2** Process shall be documented
1. Submission Information	
CR ID	1.00
Submitter	Name, Title, Contact
Date	dd/mm/yyyy
Subject	Performance Plan Enhancements
Description	Modifications are required to previously approved functionality within AmpliFund..
Priority	High, Medium, Low
2. Review Information	
Primary Reviewer	Name, Title, Contact
Secondary Reviewer(s)	Name, Title, Contact
Scope Impact	Description of how the change will impact the project scope
Schedule Impact	Description of how the change will impact the project schedule
Budget Impact	Description of how the change will impact the project budget
Optimization of Capabilities	Insert applicable notes
3. Approval Information	
Primary Approver	Name, Title, Contact
Secondary Approver	Name, Title, Contact
Approved or Denied	Enter outcome
Notes	Insert applicable notes
Date	dd/mm/yyyy

4.5.3.1
Appropriate information gathered for next step to begin.

4.5.3.3
Optimization of capabilities
4.5.3.4
State shall determine if increased funding is required

4.5.3.5
Adoptions of any necessary revisions and acceptance