



ADDENDUM #1

January 31, 2023

RFP Title: Housing Grant and Loan Management System

Owner: County of Wake – Melissa England, Procurement

RFP Bid No.: #23-012

The following addenda contains the questions and answers submitted before the deadline. Wake County answers are in blue.

1. Whether companies from Outside USA can apply for this? (like from India or Canada)
Yes, a company from overseas can apply but Wake County requires that all data be stored, transmitted, or processed within the US, including any backups or copies stored for disaster recovery purposes
2. Whether we need to come over there for meetings?
100% remote meetings are welcomed. Wake County resources should be utilized where applicable/available during implementation (e.g., MS Teams for meetings, artifacts saved on SharePoint, etc.).
3. Can we perform the tasks (related to the RFP) outside USA? (like from India or Canada)
Wake County requires that all data be stored, transmitted, or processed within the US, including any backups or copies stored for disaster recovery purposes. Implementation tasks should be scheduled during typical Wake County business hours in Eastern Standard Time. After hours production support must be available
4. Can we submit the proposals via email?
Email proposals are not allowed for this RFP.
5. Do you have an anticipated budget for this project? If so, will you share the budget amount?
Yes. Budget allocation information will be not disclosed at this time.
6. Please provide the number of internal users (state employees and other reviewers) who will need access to the system.
We anticipate 40-50 Wake County staff users.
7. Please provide the number of external users (grant recipients) who will need access to the system.
We anticipate 25-30 external users.
8. How much grant funding is typically managed by the state in a given fiscal year?
The annual grant amount managed by Wake County is approximately \$7.6 million. However, because of COVID funds and the multiyear nature of grants, we are currently managing over \$200 million of funds
9. How many grant programs are currently being managed by the county that will also be managed in the new system? Do you anticipate adding other grant programs this year, and if so, how many?
Approximately 25 grants programs; grant programs are added based on resource availability.
10. Is the county currently using another system and/ or vendor to manage grants? If so, what is the system/vendor? If not, how are grants currently being managed by the county?

Grants are managed in multiple Federal systems in addition to systems used by the County. As part of the review process, vendors will be given additional information on an individual and as needed basis

11. Will this project require data migration from existing systems? If so, please describe the data, the number and type of records, the total size of the files, etc.
Yes. Please refer to Appendix A of the RFP--->Common Services--->Row 33
We cannot disclose data description publicly. As part of the review process, vendors will be given that information on an individual and as needed basis.
12. Will the system need to integrate with any existing systems such as payment systems?
Yes. Please refer to Appendix A of the RFP--->Common Services--->Row 32
13. Do the systems you wish this solution to interface with have APIs available? If so, are they available for review? If not, please describe integration capabilities
Wake County's technological environment will not be disclosed publicly. As part of the review process, vendors will be given that information on an individual and as needed basis.
14. Are there any Security needs required to maintain the data? I.e., FEDRAMP and Audit requirements? If so, please describe.
Data security requirements will depend on the source of the grant and any specific requirements outlined by the grant. There is currently not an overarching data security requirement for grants in general.
15. Does the agency have audits on the data? If so, can you describe what is being audited?
We currently do not have formal audits on the data.
16. Does the agency hold licenses for an electronic signature tool you would like to use as part of this solution? If so, please provide the name. If not, do you have a preferred tool or would you like this to be included in the proposal?
Yes, we hold licenses for an electronic signature tool. Vendors will be given that information on an individual and as needed basis.
17. Is the vendor required to be on site for any portion of the contract term?
100% remote meetings are welcomed. Wake County resources should be utilized where applicable/available during implementation (e.g., MS Teams for meetings, artifacts saved on SharePoint, etc.).
18. Have you seen demonstrations of any grant management systems prior to issuing this RFP? If so, will you share which systems?
No, we have not.
19. In regard to references, can you provide clarity on the following request: "Proposer also to provide a list of up to three (3) previous clients within the last year that are no longer using your proposed solution if applicable." Can you clarify whether you are asking for clients who are using the solution but not using long-term support services from the vendor? Or are you asking for clients who had an implementation completed and then chose not to use that solution?
We are referring to clients that do not use your solution anymore.
20. Compliance with the following data storage, transmission, and visibility requirements:
 - Criminal Justice Information Services Security Policy (CJIS)
Does your organization anticipate storing Criminal Justice Information (CJI) data as a part of the cloud-based solution? Can a solution be proposed whereby CJI data lives in an on-premise solution at a data center and is integrated with the cloud-based solution being proposed using tokenization to ensure Cloud Service Provider (CSP) personnel have no access to the CJI data? With this approach, CJI data would not be stored in a cloud database but would provide a pointer from a cloud database to the CJI data stored in the data center enabling your organization users to securely access that data. We further assume that the CSP will not need to comply with the CJIS compliance requirements. Please confirm.
There is no CJI data in the scope of this RFP.
21. How does the County plan to fund this project? Is it part of the operating budget or capital budget?
Budget allocation information will be not disclosed.

22. Does the County have an approved budget for this new Grants Management System?
[See answer to Question #5.](#)
23. Has the County previously entertained any system demonstrations and/or presentations from vendors? If so, which systems were seen and when?
[No, we have not.](#)
24. Did the County utilize any vendor / SME consultants in defining the sought-after functionality and/or scope of work enumerated in the RFP? If yes, please provide the name of the vendor/consultant.
[No, we have not.](#)
25. Can you provide the annual dollar amount of grant funding you receive for the current fiscal year?
[Please see Question #8.](#)
26. What dollar volume of these grants are pass-through grants to sub-grantees?
[The County cannot provide that detail at this time.](#)
27. What is the total dollar amount of grants distributed?
[Please see Question #8.](#)
28. For the different grant programs, do the business processes (application, pre-award, award, etc.) and associated forms vary with each type of program or are all processes and forms standardized? When do each of the programs' application periods begin in a given fiscal year?
[The processes and forms vary by program. The application period also varies by different time periods each year.](#)
29. What is the financial management system (product name and version) currently being used? 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?
[Wake County's technological environment will not be disclosed publicly. As part of the review process, vendors will be given that information on an individual and as needed basis.](#)
30. Can you 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? Please provide an example row of data and/or database schema.
[We can provide more information about the volume/format of the data in the later stages on the selection process.](#)
31. Given the priority of securing public data and assets, does the County require any cloud-based, SaaS solutions to be provisioned on a FedRAMP-certified infrastructure?
[Please see Question #14.](#)
32. Please provide the following breakdown: (Users)
- How many County staff will access/log into the grants management system more than 40 hours a month? [Approximately 25-30 County staff.](#)
 - How many County staff will access/log into the grants management system less than 40 hours a month? [Approximately 15-20 County staff.](#)
 - How many Grantee/Recipient users will need access to the grants management system?
[Approximately 25-30 users.](#)
33. Does the County have an estimated Go-Live date? (Implementation)
[Upon successful contract negotiation completion, tentatively set for Summer 2023.](#)
34. Does the County have a specific implementation approach (i.e., single release or multiple releases? (Implementation)
[The County is willing to collaborate to determine the best strategy](#)
35. RFP Text: *"The ability to create an evaluation report that summarizes results and suggests changes for the next cycles of evaluation"* What is the County seeking in terms of analytics and recommendations for the loan evaluation report?

The County desires reporting capabilities such as outstanding loan balance by loan type or anticipated payments by time period, which will help with evaluation portfolio performance and forecasting revenue projections. This capability would be in addition to general loan management capabilities, not limited to developing payment schedules, monitoring overdue payment, receipting daily transactions, etc.

36. How will proposals be scored? (Scoring)

Proposals will be scored by a multidisciplinary team based upon the sections listed in the 'Detailed Submittal Requirements' in the RFP with all sections being integral to the success of the project.

37. To provide an apples-to-apples comparison of vendor pricing, would the County provide a common cost volume template denoting how vendors should present requirements for licenses, implementation, training, etc.? (Pricing)

The County is not providing a cost proposal template and is expecting an itemized pricing that reflects the 'Cost Proposal' section of the RFP that would include all components.

38. How many different loans types are there for the different programs? Are the loan programs substantially different? (Loan-specific)

Approximately 5-10 different loan types.

39. RFP Text: *The ability to maintain compliance with Federal government agencies & loan programs including HUD policies/procedures, and report on the "performance of the loan through all phases."* Please provide examples of measures used for performance. (loan-specific)

This will be monitored by an internal compliance process.

40. RFP Text: *The ability to upload recipient loan documentation and "provide statements of loan balances/payment schedules, and loan activity to recipient."* In what format will the recipient loan documentation need to be? In what format are statements (e.g., electronic or paper format)? (loan specific)

Both electronic and paper formats are required.

41. What is the specific Finance ERP to which the Grants and Loan Management System must integrate?

Wake County's technological environment will not be disclosed publicly. As part of the review process, vendors will be given that information on an individual and as needed basis.

42. Does the county currently have a middleware solution or integration platform in place which the Grants and Loan Management System can/should utilize with other systems (e.g. Finance ERP)? Or are you expecting the proposal to include a recommendation for integration platform and/or approach?

No, there is no integration platform currently. We will consider proposals that utilize both direct interfaces or middleware solutions.

43. Is there a case management/ticketing system already in place to which the Grants and Loan Management System will need to integrate? Or will the cases mentioned in Appendix A be wholly contained in the Grants and Loan Management System?

Requirements mentioned in Appendix A should be wholly contained in the proposed system.

44. To what 3rd party analytics tools will the Grants and Loan Management System need to integrate initially?

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45. Will all data need to be encrypted at rest? Or only subsets of data?

As part of the review process, vendors will be given that information on an individual and as needed basis

46. How many County data sources will need to be integrated into the analytics and reporting solution initially?

As part of the review process, vendors will be given that information on an individual and as needed basis.

47. How confident is the County in the current data which will need to be migrated to the new Grants and Loan Management System? Is the data clean? Deduplicated? Or will data cleansing, deduplication, etc. need to be taken into consideration?

Wake County's technological environment will not be disclosed publicly. As part of the review process, vendors will be given that information on an individual and as needed basis.

We cannot comment on cleanliness of data

48. How are loans currently managed? Is some portion of loan management handled by the Finance ERP? Will the Grants and Loan Management System just need to act as a front-end to loan data in the Finance system? Or will it need to be the system-of-record for all aspects of loan management?

Loans are managed partially by an existing system and through the Finance ERP system. It is our expectation that the Loan/Grant Management system will be integrated with the Financial ERP system.

Both systems will act as the systems of record

49. Do you already have a Salesforce instance, licensing or developers that you can access?

Wake County's technological environment will not be disclosed publicly. As part of the review process, vendors will be given that information on an individual and as needed basis.

50. Is there a specific timeframe they are looking to have the solution completed?

Upon successful contract negotiation completion, tentatively set for Summer 2023.

51. How many grantees do you have across all grant programs?

Approximately 25-30 grantees.