



COMMUNITY DEVELOPMENT DEPARTMENT • NEIGHBORHOOD PRESERVATION DIVISION  
500 Castro Street • Post Office Box 7540 • Mountain View, California 94039-7540  
650-903-6379 • FAX 650-962-8502

## Request for Proposals

# WEB-BASED GRANT MANAGEMENT SOFTWARE FOR THE CITY OF MOUNTAIN VIEW'S CDBG AND HOME PROGRAMS

### Key Proposal Dates

**Date Issued:** February 10, 2015  
**Submittal Deadline:** March 12, 2015

<u>Contents</u>	<u>Page</u>
A. RFP Information	2
B. Proposal Submittal Information	3
C. Proposal Guidelines	4
D. Selection Criteria	5
E. Additional Information	6

### **Contact Information:**

For questions regarding information in this RFP, contact

Regina Adams, Senior Planner  
City of Mountain View  
PO Box 7540  
Mountain View, CA 94039-7540  
(650) 903-6049  
[regina.adams@mountainview.gov](mailto:regina.adams@mountainview.gov)

## **A. RFP Information**

### **1. Purpose**

The City of Mountain View's Community Development Department is seeking proposals from firms or individuals that provide and administer a web-based grant management software system to assist in the administration of federal Community Development Block Grant (CDBG) and Home Investment Partnership Program (HOME) funding.

### **2. Scope of Services**

The contractor selected under this RFP will perform the following services:

- a. Coordinate with City staff to determine needs and parameters for the software system and install and maintain it throughout the contract period. The firm must be knowledgeable about and familiar with the Department of Housing and Urban Development (HUD) Integrated Disbursement and Information System (IDIS). The web-based system must be compatible with IDIS and its data queues. IDIS System Requirements are provided in <https://www.hudexchange.info/resources/documents/Electronic-Data-Interchange-Implementation-Guide.pdf>.

The software system must have the following capacities:

- i. Capacity to store, display, and summarize individual program administration and contract information;
  - ii. Capacity to enter, store, display, and summarize required CDBG and HOME statistics and other compliance information;
  - iii. Capacity to host an application suite for applicants applying for funds under the CDBG and HOME funding cycle. Applicants should be able to submit funding applications and, if approved for funding, submit compliance reports via the suite; and
  - iv. Capacity to electronically submit information in the compliance reports on a quarterly basis to IDIS.
  - v. Capacity to generate sub-recipient agreements and monitoring correspondence.
- b. The selected firm will, at a minimum, provide the following support services for the software system after installing and activating the software:
    - i. Train Neighborhoods Division staff and partners on use of the software
    - Maintain and modify, as needed, all database and report elements created under the development contract;

- ii. Maintain data backups and download to the City of Mountain View and IDIS on a determined schedule;
- iii. Modify database as needed to add or remove fields, or improve presentation of data;
- iv. Provide customer service to City of Mountain View and their clients throughout the term of contract;
- v. Promptly respond to request for assistance, training, or database repair
- vi. Provide as requested Single Family and Multi-Family Housing project management assistance; and
- vii. Generate Notices to Proceed and other project compliance documents.

### **3. Contract Schedule**

The contractor(s) selected will be required to enter into and sign a written contract with CDD. A sample contract with the general terms and conditions required by CDD is provided in **Attachment 1**.

The contract will commence on April 1, 2015 and end on June 30, 2018. At its discretion, CDD may extend the contract for up to two (2) additional years. The contractor shall function as an independent contractor(s) for purposes of the contract and neither the contractor nor its employees shall be considered City of Mountain View employees.

## **B. Proposal Submittal Information**

### **1. Deadline for Receipt of Proposals**

Proposals must be submitted to the City of Mountain View Community Development Department in City Hall at 500 Castro Street no later than **5:00 p.m. on Thursday, March 12, 2015**. Proposals arriving after the deadline will be returned, unopened, to their senders.

***Proposals will NOT be accepted after 5:00 p.m. March 12, 2015.***

### **2. Required Contents**

All submittal packages must contain the following information:

- a. Cover letter or memo signed by the Executive Director or other officer with the authorization to respond to the RFP and apply for funding.
- b. One (1) single-sided original proposal containing the information requested in Section C, *Proposal Guidelines*.
- c. One (1) electronic copy on a thumb drive or CD with the proposal and link(s) to demonstration software/sample systems.

### 3. Method of Submittal

Proposals may be submitted via mail or in person using one of the delivery options noted below:

**In Person or Express Delivery**

**Attn: Regina Adams  
Community Development Department  
City of Mountain View  
500 Castro Street  
Mountain View, CA 94041**

**US Mail**

**Attn: Regina Adams  
Community Development Department  
City of Mountain View  
P.O. Box 7540  
Mountain View, CA 94039-7540**

**Faxed or emailed proposals will NOT be accepted.**

### C. Proposal Guidelines

A suggested format for the consultant's response to this Request for Proposals is indicated below. These guidelines contain the minimum required information and are intended to facilitate the review and evaluation of the consultant responses. Overly lengthy proposals are discouraged. Proposers are requested, but not required to follow these guidelines, but the proposals must contain the following information:

#### 1. Agency/Consultant Team Information.

The proposer's complete name, business address, telephone number and e-mail address as well as the name, mailing address, telephone number and e-mail of the person the City should contact regarding the proposal. Also identify names and qualifications of key personnel who will perform the services described in this Request for Proposals. Identify their responsibilities, their specific experience related to their responsibilities on this project.

#### 2. Overview and History of Agency or Consultant Team.

A description of the proposer's organization, including names of directors, managers/principals, number of employees, longevity, client base, areas of specialization and expertise, and any other pertinent information relative to the requested services. Describe your experience in administering web-based grant management software that interfaces with HUD's IDIS system. Also state whether you or your firm currently has access to IDIS by HUD.

#### 3. References.

Three references, for which you have or your firm has performed similar services of similar scope within the past five years. Include the organization name and address, the name and telephone number of a contact person, and a brief description of the services performed.

#### **4. Scope of Work.**

A scope of work that contains a description of the proposed services. You may also include narratives describing components and parameters of the demonstration software that will be accessed by City staff in *Section B.2.c*.

#### **5. Schedule.**

A timeline for completion of the proposed installation and training. Also indicate the subsequent billing/invoicing cycles. You may bill on a monthly, quarterly or annual basis for work that has been completed.

#### **6. Budget.**

A budget that includes the cost for the services in your Scope of Work. The resulting agreement will be a performance-based contract for a not-to-exceed amount. The proposal should identify, and to the degree possible, itemize costs. The contract will be funded using federal CDBG administrative funds.

##### PLEASE NOTE:

- The City shall not pay for services before receiving them. Up-front payments or deposits are not allowed.
- Direct expenses are reimbursed only at actual cost, not cost plus some percentage or markup.

### **D. Selection Criteria**

The following criteria will be used to evaluate the proposals:

1. Completeness of response to the Request for Proposals and evidence of understanding the purpose, objectives and requirements of the services to be provided.
2. Ease of use of the software, based on the samples referenced in Section B.2.c above and the degree to which the software appears to be compatible and consistent with IDIS data sets. City staff will reference the demonstration site(s) provided and may contact firms or individuals responding to this RFP for clarifications and to get additional information.
3. Cost Feasibility. Are costs for completing stated tasks reasonable? Were cost estimates adequately itemized? Are the staffing levels for customer support appropriate for the stated tasks?

4. Information from references for fair housing and outreach services provided to other jurisdictions or other organizations.

## **E. Additional Information**

### **1. Performance Based Contract Subject to Council Appropriation**

Funding for the contract after Fiscal Year 2014-15 is contingent upon the continued receipt of CDBG funds from the HUD and City Council's appropriation of those funds for Fiscal Years 2015-16 through the end of the contract term. The contract resulting from this solicitation, if awarded, will be a performance-based contract billed in response to monthly, quarterly or annual invoicing for work completed in a satisfactory manner.

### **2. Option to Reject Any and All Proposals**

The City may, at its option, for any or for no reason, reject all proposals, re-advertise this RFP, cancel this RFP, or take a different course of action in selecting a fair housing provider.

### **3. City's Insurance Requirements**

The selected agency must be able to comply with the following City insurance requirements:

- a. Commercial General Liability/Automobile Liability Insurance

Grantee shall obtain and maintain Commercial General Liability insurance and Automobile Liability insurance in a minimum amount of One Million Dollars (\$1,000,000) per occurrence. If a general aggregate limit is used, either the general aggregate limit shall apply separately to this contract or the general aggregate limit shall be twice the required occurrence limit. Grantee's insurance coverage shall be written on an occurrence basis.

- b. Workers' Compensation Insurance

Grantee shall obtain and maintain statutory Workers' Compensation insurance and Employer's Liability insurance in a minimum amount of One Million Dollars (\$1,000,000) per accident.

- c. Professional Liability Insurance

Grantee shall obtain and maintain Professional Liability insurance in a minimum amount of One Million Dollars (\$1,000,000) per claim. Professional liability insurance must be maintained, and evidence of insurance shall be provided to City for at least three (3) years after completion of the contract of work.

d. Acceptability of Insurers

Insurance is to be placed with insurers with a current *Best Rating* of A:VII unless otherwise acceptable to City.

e. Verification of Coverage

Insurance, deductibles or self-insurance retentions shall be subject to City's approval. Original Certificates of Insurance with endorsements shall be received and approved by City before work commences, and insurance must be in effect for the duration of the contract. The absence of insurance or a reduction of stated limits shall cause all work on the project to cease. Any delays shall not increase costs to City or increase the duration of the project.

f. Additional Provisions

- i. The City of Mountain View, its officers, officials, employees and volunteers are to be covered as additional insured by Endorsement CG 20 10 11 85 or other endorsements approved by City's Risk Manager for Commercial General and Automobile Liability coverage.
- ii. For any claims related to this project, Grantee's insurance coverage shall be primary and any insurance or self-insurance maintained by City, its officers, officials, employees and volunteers shall not contribute to it.
- iii. Each insurance policy required shall be endorsed that a thirty (30) day notice be given to City in the event of cancellation or modification to the stipulated insurance coverage.
- iv. In the event Grantee employs subcontractors as part of the work covered by this Agreement, it shall be the responsibility of Grantee to ensure that all subcontractors comply with the same insurance requirements that are stated in this Agreement.
- v. Approval of the insurance by City or acceptance of the Certificate of Insurance by City shall not relieve or decrease the extent to which Grantee may be held responsible for payment of damages resulting from Grantee services or operation pursuant to this Agreement, nor shall it be deemed a waiver of City's rights to insurance coverage hereunder.
- vi. If, for any reason, Grantee fails to maintain insurance coverage that is required pursuant to this contract, the same shall be deemed a material breach of contract. City, at its sole option, may terminate this contract and obtain damages from Grantee resulting from said breach. Alternately, City may purchase such required insurance coverage, and without further notice to Grantee, City may deduct from sums due to Grantee any premium costs advanced by CITY for such insurance.

AGREEMENT BETWEEN THE CITY OF MOUNTAIN VIEW  
AND 1 FOR  
2 SERVICES

This contract is dated for identification this 3 day of 4, 5, and is made by and between the CITY OF MOUNTAIN VIEW, a California Charter City and municipal corporation, whose address is P.O. Box 7540, Mountain View, California, 94039 (hereinafter "CITY"), and 6 ALLCAPS 6, whose address is 7 (hereinafter "\*NAME\*").

RECITALS

A. CITY desires to retain the services of \*NAME\* to provide web based software and maintenance support to assist in the management of the Community Development Block Grant (CDBG) and Home Investment Partnership (HOME) Programs.

B. \*NAME\* is a qualified professional capable of providing the certain professional services which CITY seeks.

NOW, THEREFORE, in consideration of the recitals and mutual promises contained herein, CITY does hereby engage \*NAME\*, and \*NAME\* agrees, to perform the services set forth herein in accordance with the following terms and conditions:

1. **Description of Services.** \*NAME\* shall provide the following services:

\*NAME\* shall provide and administer a web-based grant management software system to assist in the administration of federal CDBG and HOME grant funding as described in Exhibit A-Scope of Work.

2. **Schedule and Term.** The schedule for performing said services is as follows:

\*NAME\* shall commence work under this contract on 11 and shall complete all work under this contract no later than 12.

3. **Compensation.** The 13 hourly or 14 daily rate for services under this Contract shall be 15 rate Dollars (\$16), and total compensation to \*NAME\* for providing the services set forth herein shall not exceed (including reimbursed expenses) 17 Dollars (\$18).

\_\_\_\_\_

4. **Payment Schedule.** CITY shall make periodic payments within thirty (30) days of receiving and approving a billing statement in proportion to the satisfactory completion of \*NAME\*'s services.

5. **Reliance Upon Professional Skill.** It is mutually agreed by the parties that CITY is relying upon the professional skill of \*NAME\*, and \*NAME\* represents to CITY that its work shall conform to generally recognized professional standards in the industry. Acceptance of \*NAME\*'s work by CITY does not operate as a release of \*NAME\*'s said representation.

6. **Independent Contractor.** It is agreed that \*NAME\* is an independent contractor, and all persons working for or under the direction of \*NAME\* are \*NAME\*'s agents, servants and employees, and said persons shall not be deemed agents, servants, or employees of CITY.

7. **Ownership of Data and Documents.** \*NAME\* agrees that all records, specifications, data, maps, designs, graphics, writings, recordings, and other tangible materials regardless of form or format, including, without limitation, electronically transmitted documents and federal Integrated Disbursement Information System files, and other collateral materials collected, compiled, drafted, prepared, produced, and/or generated in the performance of this Agreement shall be the property of CITY. \*NAME\* shall regularly provide such documents to CITY upon CITY's request. In the event that this Agreement is terminated prior to completion of the scope of work, \*NAME\* shall provide all such data and documents to CITY forthwith.

8. **Insurance.**

a. **Commercial General Liability/Automobile Liability Insurance:**

\*NAME\* shall obtain and maintain Commercial General Liability insurance and Automobile Liability insurance in a minimum amount of One Million Dollars (\$1,000,000) per occurrence. If a general aggregate limit is used, either the general aggregate limit shall apply separately to this contract or the general aggregate limit shall be twice the required occurrence limit. \*NAME\*'s insurance coverage shall be written on an occurrence basis.

b. **Workers' Compensation Insurance:**

\*NAME\* shall obtain and maintain statutory Workers' Compensation insurance and Employer's Liability insurance in a minimum amount of One Million Dollars (\$1,000,000) per accident.

c. Professional Liability Insurance:

\*NAME\* shall obtain and maintain Professional Liability insurance in a minimum amount of One Million Dollars (\$1,000,000) per claim. Professional liability insurance must be maintained, and evidence of insurance shall be provided to CITY for at least three (3) years after completion of the contract of work.

d. Acceptability of Insurers: Insurance is to be placed with insurers with a minimum current *Best Rating* of A:VII unless otherwise acceptable to CITY.

e. Verification of Coverage: Insurance, deductibles, or self-insurance retentions shall be subject to CITY's approval. Original Certificates of Insurance with endorsements shall be received and approved by CITY before work commences, and insurance must be in effect for the duration of the contract. The absence of insurance or a reduction of stated limits shall cause all work on the project to cease. Any delays shall not increase costs to CITY or increase the duration of the project.

f. Other Insurance Provisions:

(1) The City of Mountain View, its officers, officials, employees, and volunteers are to be covered as additional insured by Endorsement CG 20 10 11 85 or other endorsement approved by CITY's Risk Manager for Commercial General and Automobile Liability coverage.

(2) For any claims related to this project, \*NAME\*'s insurance coverage shall be primary and any insurance or self-insurance maintained by CITY, its officers, officials, employees, and volunteers shall not contribute to it.

(3) Each insurance policy required shall be endorsed that a thirty (30) day notice be given to CITY in the event of cancellation or modification to the stipulated insurance coverage.

(4) In the event \*NAME\* employs subcontractors as part of the work covered by this Agreement, it shall be the responsibility of \*NAME\* to ensure that all subcontractors comply with the same insurance requirements that are stated in this Agreement.

(5) Approval of the insurance by CITY or acceptance of the Certificate of Insurance by CITY shall not relieve or decrease the extent to which \*NAME\* may be held responsible for payment of damages resulting from \*NAME\*'s services or operation pursuant to this Agreement, nor shall it be deemed a waiver of CITY's rights to insurance coverage hereunder.

(6) If, for any reason, \*NAME\* fails to maintain insurance coverage that is required pursuant to this contract, the same shall be deemed a material breach of contract. CITY, at its sole option, may terminate this contract and obtain damages from \*NAME\* resulting from said breach. Alternately, CITY may purchase such required insurance coverage, and without further notice to \*NAME\*, CITY may deduct from sums due to \*NAME\* any premium costs advanced by CITY for such insurance.

9. **Hold Harmless.** \*NAME\* hereby agrees to and shall indemnify, defend, and hold CITY, its officers, agents, and employees harmless from any liability for damage or claims for damage for personal injury, including death and/or property damage, caused by negligent acts, errors, or omissions in performance of professional services under this Agreement by \*NAME\* or \*NAME\*'s contractors, subcontractors, agents or employees operations under this Agreement. CITY shall cooperate reasonably in the defense of any action, and \*NAME\* shall employ competent counsel, reasonably acceptable to the City Attorney.

10. **Applicable Laws and Attorneys' Fees.** This Agreement shall be construed and enforced pursuant to the laws of the State of California. Should any legal action be brought by a party for breach of this Agreement or to enforce any provision herein, the prevailing party of such action shall be entitled to reasonable attorneys' fees, court costs, and such other costs as may be fixed by the court. Reasonable attorneys' fees of the City Attorney's Office, if private counsel is not used, shall be based on comparable fees of private attorneys practicing in Santa Clara County.

11. **Nondiscrimination.** \*NAME\* shall afford equal employment opportunities for all persons without discrimination because of race, color, religion, sex, sexual orientation, familial status, political affiliation, national origin, ancestry, age, marital status, physical or mental disability, military status, gender, gender identity and expression, or genetic information.

12. **Amendment.** This Agreement may be amended in writing and signed by both parties.

13. **Termination.** CITY may terminate this Agreement at any time by providing ten (10) days advance written notice to \*NAME\*. Should CITY terminate pursuant to said notice, CITY shall pay \*NAME\* for \*NAME\*'s services rendered to the date of cancellation based on percentage of completion of scope of basic services, including actual reimbursable expenses. In no event shall said fees exceed the maximum compensation established in this Agreement.

14. **Attachments or Exhibits.** Except as expressly referenced herein, no portion of any terms or conditions included in any attachments or exhibits shall be a part of this Agreement, and they shall have no force or effect. If any attachments or exhibits to this Agreement are inconsistent with this Agreement, this Agreement shall control.

15. **Entire Agreement.** This Agreement contains the entire understanding between the parties with respect to the subject matter herein. There are no representations, agreements, or understandings (whether oral or written) between or among the parties relating to the subject matter of this Agreement which are not fully expressed herein.

16. **Public Records.** The parties recognize and acknowledge that CITY is subject to the California Public Records Act, California Government Code Section 6250 and following. Public records are subject to disclosure.

17. **Notices.** Any notice required to be given to \*NAME\* shall be deemed to be duly and properly given if mailed to \*NAME\*, postage prepaid, addressed to:

\_\_\_20\_\_\_

or personally delivered to \*NAME\* at such address or at such other addresses as \*NAME\* may designate in writing to CITY.

Any notice required to be given CITY shall be deemed to be duly and properly given if mailed to CITY, postage prepaid, addressed to:

Community Development Director  
City of Mountain View  
500 Castro Street  
P.O. Box 7540  
Mountain View, CA 94039-7540

or personally delivered to CITY at such address or at such other addresses as CITY may designate in writing to \*NAME\*.

ATTACHMENT 1

IN WITNESS WHEREOF, this Agreement, dated \_\_\_22\_\_\_, between the City of Mountain View and \_\_\_23\_\_\_ for services related to \_\_\_24\_\_\_, is executed by CITY and \*NAME\*.

APPROVED AS TO CONTENT:

\_\_\_\_\_  
\_\_\_25\_\_\_

“CITY”:  
CITY OF MOUNTAIN VIEW,  
a California Charter City and municipal  
corporation

FINANCIAL APPROVAL:

\_\_\_\_\_  
Finance and Administrative  
Services Director

By: \_\_\_\_\_  
\_\_\_26\_\_\_ Department Head/  
City Manager

APPROVED AS TO FORM:

\_\_\_\_\_  
City Attorney

By: \_\_\_\_\_  
\_\_\_\_\_  
Taxpayer I.D. Number

MVF00-03 (Rev. 01-03-13)