



Section I

Title Page



County of Albany

Response to RFP#2023-088

Grant Management Software

AmpliFund Technical Proposal

August 18, 2023

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Section II

Qualification/Experience

Qualification of Proposer

Provide the name, a brief history and description of your firm.

Name of Proposer: StreamLink Software Inc. DBA AmpliFund

Since 2011, AmpliFund has been providing the grant management software empowering funders and recipients to manage every phase of the grant lifecycle. State, local, and tribal governments rely on AmpliFund's tools, resources, and exceptional support to create capacity for their teams, drive compliance, and realize the full potential of their funding. AmpliFund is more than just software, as our team fosters strong relationships with each of our customers and delivers exceptional customer service and the tools needed to realize the full potential of your grants. AmpliFund's ability to centralize processes to capture and report grants-related data will provide transparency into your grant portfolio, and help your team collaborate effectively. AmpliFund is a solution that can grow along with the County and one that can help to alleviate some of the challenges faced when it comes to managing the full grant lifecycle.

Whether that is the need for gathering reliable statistics on grant spending, maintaining compliance, or providing oversight for a variety of recipients, AmpliFund can provide a comprehensive solution.

Identify your firm's professional staff members who will be involved in the County engagement and the experience each possesses and the location of the office from each work.

Andrew Leskiw, Implementation Team Lead

As an AmpliFund Implementation Team Lead, Andrew Leskiw is responsible for planning and executing successful new customer rollouts. Acting as a Subject Matter Expert on grant administrative requirements, he provides experience and knowledge on how to streamline business processes and improve transparency in the grants management process.

Alison Meier, Project Manager

As an AmpliFund Project Manager, Alison Meier is responsible for directly overseeing all project traffic flow and measuring progress from Implementation start to finish. As a Subject Matter Expert, she has extensive experience handling a high-volume portfolio of customer implementations. She leads the push to track customer success metrics, including capacity modeling and improving efficiency. She will serve as the liaison for the project stakeholders, especially those with direct involvement in data integration and system integrations. She will



act as the main point of contact for Union County and drive a standardized methodology to ensure project success.

Pilar Martinez, Customer Success Lead

Pilar Martinez is responsible for building, and expanding relationships with the existing client base, which includes managing key accounts. She facilitates proactive customer communication, identifies new opportunities, and drives the expansion of the customer's utilization of AmpliFund. Pilar has over seven (7) years of experience managing projects in the private sector. In her previous role in AmpliFund she was a Project Manager for two (2) years, her main responsibilities were overseeing all project traffic flow, measuring progress from start to finish, and managing account relationships with clients.

The AmpliFund's team works out of the main office in Cleveland, OH.

Name and title of person(s) authorized to bind the Proposer, together with the main office address, and telephone number (including area code).

Scott Smith, CEO
812 Huron Road East, Suite 550, Cleveland, OH 44115
216.377.5500

Detail your firm's experience with web based and cloud based grant management systems.

AmpliFund is the leading purpose-built grant management software empowering funders and recipients to manage every phase of the grant lifecycle. State, local, and tribal governments rely on AmpliFund's tools, resources, and exceptional support to create capacity for their teams, drive compliance, and realize the full potential of their funding.



Provide at least two (2) references from similar projects including name, addresses, and telephone numbers.

Kalamazoo County, Michigan

Name: Mary Balkema

Email Address: mxbalk@kalcounty.com

Telephone Number: 269.720.3246

Rockland County

Name: Jenna Nazario

Email Address: nazarije@rockland.ny.us

Telephone Number: 845.638.5506

Sacramento County

Name: Matt Levesque

Email Address: levesquem@saccounty.gov

Telephone Number: 916.874.4300

Provide any additional information that would distinguish your firm in its service to Albany County.

AmpliFund understands that efficient and simplified grant seeking capabilities will help ensure that the County can continue to provide and elevate services to the residents of Albany. The following items call attention to what separates AmpliFund from other providers.

Purpose Built, Configurable and Scalable: AmpliFund offers a comprehensive suite of grant management features, grant record identification, budget monitoring, performance tracking, reporting, and compliance management. This all-in-one solution eliminates the need for multiple software tools, streamlining operations and increasing efficiency. Additionally, AmpliFund provides advanced configurations to fit the unique needs of each organization, like workflows, fields, and forms to collect important data. AmpliFund easily scales to accommodate the growth and changing requirements of grant programs, whether it's managing a few grants or a large portfolio. This flexibility ensures a tailored solution that aligns with the County's specific business processes.

Robust Reporting, Analytics & Integrations: AmpliFund offers powerful reporting and analytics capabilities, enabling organizations to gain valuable insights into their grant programs. Users can generate comprehensive reports, track financials, monitor performance against goals, and make data-driven decisions to optimize resource allocation and improve outcomes. AmpliFund seamlessly integrates with existing systems and third-party applications, such as financial management systems and CRM tools. This integration eliminates data silos, improves data accuracy, and enhances overall operational efficiency.



Dedicated Customer Success and Industry Expertise: AmpliFund provides excellent customer support, including training resources, ongoing technical assistance, and regular software updates. The dedicated support team is committed to ensuring customer satisfaction and helping organizations maximize their investment in AmpliFund. AmpliFund has extensive experience working with various government agencies and organizations in managing their grant programs. This industry expertise ensures that the software is designed to address the specific needs and challenges faced by grant management professionals.

Compliance and Audit Readiness: AmpliFund helps organizations maintain compliance with grant regulations and guidelines. With its comprehensive features, AmpliFund assists organizations in adhering to grant regulations and guidelines. The software facilitates proper documentation management by providing a centralized repository for storing essential grant-related documents. It also enables precise tracking of expenditures, ensuring accurate allocation of funds and budget management. AmpliFund's robust audit trail capability captures all activities and changes within the system, establishing transparency and accountability. This simplifies the compliance process by providing a clear record of grant management activities. By automating compliance checks and validations, AmpliFund proactively identifies potential errors or inconsistencies, minimizing the risk of non-compliance. Overall, AmpliFund's focus on compliance and audit readiness empowers organizations to navigate the complexities of grant management with confidence and mitigate compliance risks effectively.

Track Record of Success with Future-Ready Technology: AmpliFund has a proven track record of success, with numerous satisfied clients across different sectors with a strong focus in the Public Sector. The software has helped organizations streamline their grant management processes, improve efficiency, and achieve better outcomes. AmpliFund continually invests in research and development to stay at the forefront of grant management technology. By leveraging the latest advancements, AmpliFund helps organizations stay ahead of the curve and adapt to evolving grant management practices.

AmpliFund also provides a return-on-investment to the County by expediting your time to value with our fast speed to deployment. AmpliFund provides a return on investment by:

Driving Organizational Accountability

- Ownership is assigned to individuals responsible for grant performance in AmpliFund. The system is designed to roll up data at all levels, including the County leadership and applicants to assess performance output, which increases accountability.
- Compliance is built into AmpliFund's core operations, which will help the County stay on top of evolving federal grant requirements.

Creating Transparency

- AmpliFund provides visibility into the grant management process from awarding to closeout.



- The system can capture all grant-related data for easy analysis and reporting.
- AmpliFund provides a holistic view of funding and expenditure details.

Building Capacity

- AmpliFund improves business process uniformity and helps eliminate duplicative processes. AmpliFund reduces the need for manual processes used to capture detailed performance and budget data.
- AmpliFund can integrate with existing systems to streamline your efforts.

AmpliFund employs a unique pricing model to decrease the overall costs of AmpliFund for our clients. Our overall goal in pricing is to help the County create a consistent, stable price that can be budgeted for annually.

Based on the requirements of this opportunity, AmpliFund is proposing our Grant Seeker product. Furthermore, the County can upgrade to Lifecycle at any time to support grant making efforts as well. AmpliFund's Grant Seeker solution puts Albany at the helm of a flexible, purpose-built solution. It helps you manage the full grant lifecycle with customized processes across multiple departments and integrates with other software applications. It also gives you the ability to configure further components of the system at any time.

AmpliFund Grant Seeker provides a configurable, purpose-built solution for you to map your specific departments and processes to the application, yielding tailored reports and dashboards for full transparency across your grant portfolio. AmpliFund Grant Seeker is specifically designed for organizations with more complex grant processes that are often looking for more personalized insights on their grant portfolio.

Proposer shall include a completed "Vendor Responsibility Questionnaire" (Attachment "C") with the Proposal.

AmpliFund has completed Attachment C, "Vendor Responsibility Questionnaire", and included it in Section VI, "Mandatory Documentation" as per the RFP requirements.

In addition, Albany County may make such investigations it deems necessary to determine the ability of the Proposer to perform the work. The Proposer shall furnish to the County within five (5) days of a request, all such information and data for this purpose as may be requested. The County reserves the right to reject any Proposal if the information submitted by, or investigation of, such Proposer fails to satisfy the County that such Proposer is properly qualified to carry out the obligations of the contract and to complete the work contemplated therein. Conditional Proposals will not be accepted.

AmpliFund agrees to these terms.

Resumes

Andrew Leskiw

Implementation Team Lead

Maryland Judiciary

Project: AmpliFund Implementation **Role:** Implementation Team Lead/Business Analyst
Helped facilitate the implementation of a new Enterprise grants management solution for the Maryland Judiciary. Leads business process discussions across multiple departments and collaborates to develop a streamlined strategy to standardize the process of publishing funding opportunities. Documents and configures a multi-dimensional application review process involving departments external to AmpliFund. Designs and creates a customized reporting solution to aid in the systematic creation of Grant Agreement contract materials. By leveraging data from the funding opportunity, applications, and review process, resulting in reduced time spent producing contracts by the programmatic staff.

State of Illinois

Project: AmpliFund Implementation **Role:** Configuration/Business Analyst
Documented centralized business processes at the OMB (Office of Management and Budget) level to promote standardization across State agencies. Working with the State OMB and IT teams on features that are specific to the State of Illinois, including integrations with the Illinois Grant Accountability and Transparency Act (GATA) portal. Role includes documenting the new requirements and transitioning this knowledge to the Product and Development teams.

AmpliFund (November 2018 – Present)

Implementation Team Lead

- Responsible for leading successful grant management software implementation.
- Lead business process discussions to identify and align customer requirements with system functionality.
- Establish customer goals aligning them with customized implementation plans to maximize the efficacy of the onboarding process.
- Lead discussions with cross-functional teams to help align and establish sound business processes and optimize business operations.
- Develop a leadership alignment and organizational readiness approach for the implementation.

Business Analyst

- Document client business processes and translate functionality within the AmpliFund environment.
- Perform client trainings on pre-award processes and active grant management functionality.
- Identify business process improvement points and facilitate communication on



addressing inefficiencies.

- Design and create custom reporting solutions tailored to the managerial and programmatic needs of clients.



Alison Meier

TEDCO (Maryland Technology Development Corporation)

Project: AmpliFund Implementation **Role:** Project Manager

Created and facilitated the implementation of a new Enterprise grants management solution for TEDCO (Maryland Technology Development Corporation). Alison's main role during implementation is to create, design, and manage the implementation project plan, as well as acting as the main liaison between AmpliFund and the customer.

AmpliFund (October 2022—Present)

Project Manager

- Directly oversee all project traffic flow, measuring progress from Implementation start to finish.
- Handles a high-volume portfolio of customer implementations.
- Tracks customer metrics, including efficiency and capacity modeling.
- Serves as a liaison for project consultants and partners that are driving their own implementations of AmpliFund or other services, such as data migration or system integrations.
- Partners with the department manager and team leads to create and improve a standard methodology for customer implementation.

iCallidus (December 2021 — October 2022)

Program Manager

- Managed Defense Health Agency (DHA) and Department of Defense (DOD) contracts from inception to completion to help drive mission utilizing PMP best practices.
- Provided program management leadership to a variety of government stakeholders and non-stakeholders relating to payroll/finance, human resources, onboarding, background check, and information technology.
- Analyzed contract needs, make proactive recommendations to improve existing processes, create new processes, and implement updated standard operating procedures.
- Managing multiple clients and projects simultaneously and ensuring that the mission, budgets, daily production, and scope are on schedule.



Pilar Martinez

Customer Success Lead

California Highway Patrol

Project: AmpliFund Implementation

Role: Project Manager

Have a centralized fully configured solution for all grant-related data and processes into one complete system including their application and awarding process as well as their recipient monitoring and internal reporting process were some of California Highway Patrol's goals for their AmpliFund implementation. As Project Manager, oversaw a successful implementation, communicated status of the project and assured satisfaction of the client.

Nebraska Department of Economic Development

Project: AmpliFund Implementation

Role: Project Manager/ Customer Success Lead

Implement an online grants management system used to facilitate and manage all components of the State of Nebraska Department of Economic Development's grant process as well as integrating with their financial system are some of the main goals of the implementation. Civic and Community Center Financing Fund, our pilot program is now fully managing both Pre and Post Awards aspects of their process in AmpliFund. Nebraska Housing Trust Fund and Business Innovation Programs applications have successfully gone live. In this role, risk management and constant communication have been key for the project's success.

AmpliFund (May 2019 – Present)

Customer Success Lead

- Develops a strong understanding of AmpliFund customers including their business objectives, goals, and company mission.
- Manages all customer relationships, ensuring successful product adoption and utilization.
- Partners with departments including Sales, Implementation, Support, and Development to ensure a best-in-class customer experience.
- Collaborates with the Implementation team in order to develop ideas, solutions, and provide a high level of service to customers.
- Works with Product team to identify inefficiencies, incorporate feedback from end users, map out issues, prioritize and work to resolve them with appropriate teams.

Project Manager

- Directly oversees all project traffic flow, measuring progress from start to finish.
- Provides project estimates and schedules, and proactively identifies and resolves any issues that compromise deadlines, budgets, or overall quality of deliverables.
- Assures successful implementation and ongoing satisfaction of the client.
- Develops a strong understanding of our customers, business objectives, and company mission.

Section III

References

Kalamazoo County, Michigan

Name: Mary Balkema

Email Address: mxbalk@kalcounty.com

Telephone Number: 269.720.3246

Rockland County

Name: Jenna Nazario

Email Address: nazarije@co.rockland.ny.us

Telephone Number: (845) 638-5506

Sacramento County

Name: Matt Levesque

Email Address: levesquem@sacounty.gov

Telephone Number: 916.874.4300

Section IV

Plan Implementation

Implementation Methodology

AmpliFund's Implementation methodology is designed to suit the needs of the County of Albany. Our process has been refined based on successes and lessons learned through previous implementations. We understand that no two organizations are alike. What distinguishes AmpliFund in our approach to implementations is our adaptability. From the time spent understanding the County's specific needs to the in-depth configuration following the discovery and design of AmpliFund, our Implementation Team gains an in-depth understanding of how the County functions and will ensure AmpliFund is configured to best meet your needs and help assure adoption of the solution across Albany. AmpliFund's implementation approach can be broken down into seven distinct phases that will ensure a successful implementation. These steps are outlined below:

Phase	Application
Kickoff	Change and Project Management basics
Discovery	Requirements gathering tying to grants lifecycle
Design	Reverse engineer the process and outline AmpliFund usage
Configuration	Build and document against Design specifications
Testing	Ensure AmpliFund functionality supports business process
Training	Train users on how they will use the process
Deployment	"Go Live" with iterative process rolled out to user groups

Kickoff

During the Kickoff phase, AmpliFund's Implementation Team will begin their understanding of the current grant management processes in place for Albany. Throughout the Kickoff phase, AmpliFund adheres to strict project management and change management processes based on tools and resources used in previous and ongoing implementations. These practices are based on lessons learned from previous implementations and will ensure a smooth process. The County receives a Requirements Gathering Workbook to fill out at the start of the implementation process that serves as the basis for the Implementation Team and begin to outline the process improvement areas to ensure full

adoption and configuration of AmpliFund to meet the County's specific and unique needs. Supporting customers with a structured and intentional approach to change management alongside the creation of customer process improvement plans have proven to increase success for rolling out and adopting AmpliFund. Beginning in Kickoff and throughout the implementation process, the County and the Implementation Team will have ongoing check-ins, regular status updates, and coordination across various workstreams. Planning meetings during the Kickoff phase are centered around establishing project and change management procedures. Continuous meetings, open communication, and establishing a relationship helps ensure that deadlines are met, both sides have an in-depth understanding of scope of the project, and most importantly, that there is a precedent for transparent communication from the outset.

Overview and Approach

Kickoff

- Review Requirements Gathering Workbook and introduce the Discovery Phase of implementation

Discovery

- Discovery Phase: Requirements Gathering Workshops focused on the Grants Lifecycle process mapping
 - Pre-Award
 - Post-Award
 - Awarding
 - Reporting

Design and Configure

- Document, Design, and Configure business processes and grants lifecycle activities in AmpliFund



Discovery and Design

The Discovery phase is broken into distinct parts that requires input and collaboration between the Implementation Team and the grant representatives for the County. The Discovery phase is composed of Change Management and Grants Lifecycle Process Mapping. Based on the work completed in the Requirements Gathering Workbook helps ensure that Discovery sessions are focused and move the project forward.

As a bridge between Kickoff and Discovery, the Requirements Gathering Workbook provides the Implementation Team a direct overview of Albany's current systems in place and process alike. The County provides info on their Grants Portfolio and provides general overviews of each grant and the corresponding timelines for each. The workbook also covers a Systems Inventory, Reports Inventory, and an organizational contact list with "Roles and Responsibilities" delineated. These aspects all provide a detailed overview of the County and allow for smoother configuration and deployment of the AmpliFund solution.

Alongside the work conducted in the Requirements Gathering Workbook, the Implementation Team will conduct Discovery sessions to carry out change management activities like stakeholder and training analysis discussions, requirements review sessions for Albany project activities, and design review sessions. These review sessions take place via an iterative process through requirements gathering and configuration stages.

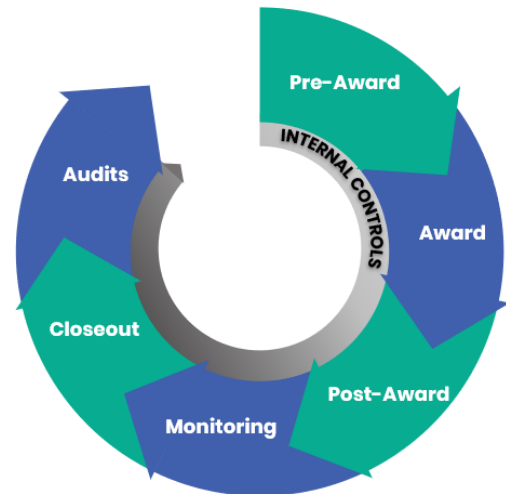
Implementation Discovery Phase

Change Management

- Perform Stakeholder Analysis identifying stakeholders and their roles and responsibilities within grant management
- Assess project expectations and involvement at various levels and begin to identify measures of success for implementation
- Define Change Management impacts and activities

Grants Lifecycle Process Mapping

- Document business processes leveraged at each phase of grant management to inform configuration and training in AmpliFund
- Configure AmpliFund to embed business processes in AmpliFund and design a training plan for end users



During Change Management, the County and the Implementation Team identify County stakeholders and establish understanding of roles and responsibilities within grant management to correctly identify how users will interact with AmpliFund. This allows for the assessment of project expectations and involvement of individuals at various levels to identify success markers regarding implementation. Ultimately, when the Implementation Team understands County users, they are able to enact change and project management strategies outlined in the Kickoff phase.

Grants Lifecycle Process Mapping involves documenting the business processes leveraged at each phase of grant management to inform the configuration of AmpliFund for the County. This also deeply informs the construction of user training of the AmpliFund solution. The design process is based on information gathered through the Discovery phase. Through this process, the Implementation Team will reverse engineer the business and grant management processes outlined by the County, and then outline how these business and grant management processes will be carried out in AmpliFund.

This is designed to make the implementation process simple. By incorporating customer goals discovered through Grants Lifecycle Process Mapping, AmpliFund more directly aligns to the County's specific needs. By targeting and understanding your goals, we can specifically align the conversation to what is important to your organization. That way, the Implementation Team can be sure to have the most important aspects of AmpliFund ready for deployment as soon as possible with time to go back and focus on other features once



AmpliFund is initially up and running.

The Implementation Team will conduct discovery discussions, requirements review, and design sessions related to each County-identified feature of AmpliFund and its state of the grant lifecycle: pre-award, awarding, post-award, and reporting requirements (monitoring, closeout, and audits). These mapping sessions will allow for the Implementation Team to configure AmpliFund to embed pre-existing business processes into AmpliFund and design a training plan based on pre-existing business processes for end users, ensuring easier widespread adoption of AmpliFund across the County. By broadly looking at the goals, approach, and process of the County, the Implementation Team will understand how their requirements can be best and broadly applied for easier use of the system overall.

Easier use and configuring to incorporate pre-existing business practices ultimately leads to total organizational adoption of AmpliFund and assures standardization. Standardization across the County will mean consistency in grant management processes, better data collection, and overall easier use of AmpliFund. Organizationally, this will ensure that there is clear tracking of funding, budgets, and project goals, increasing transparency between departments and recipients. Uniformity and overall standardization across your organization is possible through the thoroughness of the discovery process.

Configuration and Testing

The Design, Configuration, and Testing phases overlap one another, as each of these phases inform the other in how to best configure AmpliFund for Training and Deployment. The Configuration phase is entirely informed by the Design phase, as the Configuration phase is the building of AmpliFund based on Design specifications, as well as the reconfiguration of AmpliFund based on Testing of the configurations. In AmpliFund, during the configuration phase, business processes and grant lifecycle activities are built into AmpliFund, based on the information gathered through Discovery and Design, and ultimately tested to ensure AmpliFund is meeting the County's specific business processes and grant management needs.

Through the Configuration phase, the Implementation Team will configure and document customer grant lifecycle process and reporting requirements in AmpliFund based on the agreed upon requirements collected in the Discovery and Design phases of Implementation. This is the part of the process where custom built reports and other Albany-specific workflow/reporting customization occurs. AmpliFund, in this phase, is adapted to meet the needs and requirements outlined in the first three phases of the Implementation process.

Once AmpliFund has been configured to the specifications of the County, testing by QA and the Implementation Team then begins. The Implementation Team will test all business processes and configured options prior to review by the County. From these tests, the Implementation Team will provide testing feedback and recommendations for the incorporation of AmpliFund. Upon review and then approval, the Implementation Team



begins facilitating user acceptance testing (UAT) by the County of the configured business processes and technical output. This phase will also include the design of system interfaces and integrations of other software.

Upon the completion of testing and the evaluation of the output from testing sessions, the Implementation team will design, and conduct user training based upon the results of testing sessions.

Training

Once Configuration and Testing are complete, the Implementation Team will then design and conduct user training, while implementing appropriate support processes for users.

AmpliFund will provide training for the following user groups:

- Implementation Team
- Program Managers
- Financial Users
- Technical Users/System Admins
- Reviewers (external)
- Applicants (external)
- Recipients (external)

The Implementation Team will also develop product and process supporting templates and documentation to facilitate the organizational adoption of AmpliFund. These may include:

- Written process documentation
 - Staff Scoring (Reviewer) User Guide
 - Applicant User Guide
 - Recipient User Guide
- Video/Recording Support

Throughout the training process, AmpliFund will document all training and support requirements and AmpliFund will produce all agreed upon training and support artifacts. The County will have the option to sign off of each of these training materials before training begins, but it is not required. Upon the completion of training, the Implementation Team will be finished working with users and the County will be in the care of the Customer Success Team for the remainder of their time using AmpliFund. The County will be assigned to a Customer Success Team Lead who will be able to take on specific questions, needs and provide support to AmpliFund users.

Deployment

While the Deployment phase is listed as the final phase, AmpliFund is ready for “Go Live” out-of-the-box. The Deployment phase, itself, is an iterative process rolled out to specific user groups as different configurations are tested and users are trained as to how to use AmpliFund. What deployment specifically means is that an approved set of configurations are released to the County for use in the product environment. Deployment will happen



multiple times through the implementation process. All grant management systems have iterative go lives, and what distinguishes AmpliFund in its deployment process is the in-depth background knowledge provided by the County and the Implementation Team's taking of that knowledge and custom configuration of AmpliFund to truly fit the business practices and grant management processes of Albany. AmpliFund will ultimately serve as a direct solution to the County's needs.

On the following pages, AmpliFund has provided an implementation plan detailing work tasks and their associated timelines.

WBS	Task Name	Start	Finish	Req. Parties	Dependencies
	County of Albany Grants Management System Implementation				
1	AmpliFund Grant Seeker Implementation	-	-	-	
1.1	Kickoff	Week 1	Week 3	-	0
	Pre-Kickoff Requirements Gathering	Week 1	Week 1	AF	
	Pre-Kickoff Activities	Week 1	Week 1	AF	
	Kick-Off Meeting Materials	Week 1	Week 1	AF	
	Kick-Off Meeting	Week 1	Week 1	Albany, AF	
	Kick-Off Meeting Follow-up	Week 1	Week 1	AF	
	Customer Goals Draft Documentation	Week 1	Week 1	AF	
	Project Management Activities	Week 1	Week 1	AF	
	Develop Project Management Plan	Week 1	Week 3	AF	
	Change Management Plan	Week 1	Week 3	AF	
	Project Management Plan	Week 1	Week 3	AF	
	Communication Matrix	Week 1	Week 3	AF	
	Problem Escalation Procedure	Week 1	Week 3	AF	
	Change Request Plan	Week 1	Week 3	AF	
	Project Management Review Sessions	Week 2	Week 3	AF	
	Project Management Plan Sign-Off	Week 3	Week 3	Albany	
1.2	Discovery	Week 1	Week 5	-	1.1
	Admin	Week 1	Week 2	-	
	Discovery Session Prep	Week 1	Week 2	AF	
	Internal Discovery Wrap Up	Week 1	Week 2	AF	
	Documentation	Week 1	Week 2	-	
	Requirements Gathering Workbook	Week 1	Week 3	Albany	
	Account Configuration Form	Week 1	Week 3	Albany	
	Grants Portfolio Audit	Week 1	Week 3	Albany	
	Systems Inventory	Week 1	Week 3	Albany	
	Reporting Collection and Analysis	Week 1	Week 3	Albany	
	Requirements Gathering Review	Week 1	Week 3	Albany, AF	
	Documented and Annotated "As is" Processes	Week 1	Week 5	AF	
	Goals and Objectives	Week 1	Week 5	AF	
	Meetings	Week 2	Week 5	-	
	Requirements Gathering Workshop	Week 2	Week 5	Albany, AF	
	Discovery Session 1	Week 2	Week 5	Albany, AF	
	Grants Lifecycle Process Mapping	Week 2	Week 5	Albany, AF	

	Pre-Award	Week 2	Week 5	Albany, AF	
	Grant Research and Opportunity Review	Week 2	Week 5	Albany, AF	
	Documentation Collection (Application, etc.)	Week 2	Week 5	Albany, AF	
	Awarding	Week 2	Week 5	Albany, AF	
	Documentation Collection (Award Agreement, etc.)	Week 2	Week 5	Albany, AF	
	Discovery Session 2	Week 2	Week 5	Albany, AF	
	Post-Award, Monitoring, and Closeout	Week 2	Week 5	Albany, AF	
	Post-Award Financial Processes	Week 2	Week 5	Albany, AF	
	Post-Award Programmatic Processes	Week 2	Week 5	Albany, AF	
	Reporting Structure	Week 2	Week 5	Albany, AF	
	Discovery Session 3	Week 2	Week 5	Albany, AF	
	Post-Award Financial Processes	Week 2	Week 5	Albany, AF	
	Discovery Session 4	Week 2	Week 5	Albany, AF	
	Reporting	Week 2	Week 5	Albany, AF	
	Discovery Session 5	Week 2	Week 5	Albany, AF	
	Laserfische Introduction (separate workstream)	Week 2	Week 5	Albany, AF	
	Discovery Session 6	Week 2	Week 5	Albany, AF	
	Integrations Introduction (separate workstream)	Week 2	Week 5	Albany, AF	
	Action Items Discovery	Week 2	Week 5	Albany, AF	
1.3	Design	Week 6	Week 8	-	1.2
	Documentation	Week 6	Week 8	-	
	Draft Preliminary Training plan based on Discovery and Design	Week 6	Week 8	AF	
	Complete Master Data Template	Week 6	Week 8	AF	
	Complete Pre-Award Design	Week 6	Week 8	AF	
	Complete Post-Award Design	Week 6	Week 8	AF	
	Meetings	Week 6	Week 8	-	
	Design Review Session I: Master Data	Week 6	Week 8	Albany, AF	
	Design Review Session II: Grants Lifecycle - Part 1	Week 6	Week 8	Albany, AF	
	Design Review Session II: Grants Lifecycle - Part 2	Week 6	Week 8	Albany, AF	
	Design, Goal, and IPP Review Session	Week 6	Week 8	Albany, AF	
	Working Prototypes Deliverable	Week 6	Week 8	AF	
	Gap Analysis and System Design/Configuration Document Deliverable	Week 6	Week 8	AF	
	Admin	Week 6	Week 8	-	
	Implementation Project Plan (IPP)	Week 6	Week 8	Albany, AF	
	Project Management - Design	Week 6	Week 8	AF	
	Action Items Design	Week 6	Week 8	Albany, AF	

1.4	Configuration	Week 9	Week 12	-	1.2,1.3
	Configuration	Week 9	Week 12	-	
	Research/Pre-Award Process	Week 9	Week 12	AF	
	Grant Portfolio Configuration	Week 9	Week 12	AF	
	Grant Financial Process	Week 9	Week 12	AF	
	Grant Performance Tracking	Week 9	Week 12	AF	
	Project Configuration	Week 9	Week 12	AF	
	Meetings	Week 9	Week 12	-	
	Configuration Review Session 1 (Topic TBD)	Week 9	Week 12	Albany, AF	
	Configuration Review Session 2 (Topic TBD)	Week 9	Week 12	Albany, AF	
	Configuration Review Session 3 (Topic TBD)	Week 9	Week 12	Albany, AF	
	Configuration Review Session 4 (Topic TBD)	Week 9	Week 12	Albany, AF	
	Goal and IPP Check-in Session	Week 9	Week 12	Albany, AF	
	User Access Deliverable	Week 9	Week 9	AF	
	Data Accessibility and Reporting Deliverable	Week 9	Week 9	AF	
	Admin	Week 9	Week 12	-	
	Project Management - Configuration	Week 9	Week 12	AF	
	Obtain Customer Signoff for Configuration	Week 9	Week 12	Albany	
	Action Items Configuration	Week 9	Week 12	Albany, AF	
1.5	Testing	Week 13	Week 14	-	1.4
	Internal validation of configuration and documentation in AmpliFund	Week 13	Week 14	AF	
	Meetings	Week 13	Week 14	-	
	Testing Review Session 1 (Topic TBD)	Week 13	Week 14	Albany, AF	
	Testing Review Session 2 (Topic TBD)	Week 13	Week 14	Albany, AF	
	Testing Review Session 3 (Topic TBD)	Week 13	Week 14	Albany, AF	
	Goal and IPP Check-in Session	Week 13	Week 14	Albany, AF	
	Admin	Week 13	Week 14	-	
	Project Management - Testing	Week 13	Week 14	AF	
	Action Items Testing	Week 13	Week 14	Albany, AF	
1.6	Cohort Training	Week 10	Week 18	-	1.3
	Documentation	Week 10	Week 13	AF	
	Training Analysis	Week 10	Week 13	AF	
	Design Cohort Training Plan	Week 10	Week 13	AF	
	Draft Training Materials	Week 10	Week 13	AF	
	Meetings	Week 14	Week 18	-	
	Cohort Training Plan Review Session	Week 14	Week 18	Albany, AF	
	Cohort Training Session 1 (Topic TBD)	Week 14	Week 18	Albany, AF	

	Cohort Training Session 2 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Cohort Training Session 3 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Cohort Training Session 4 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Cohort Training Session 5 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Cohort Training Session 6 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Cohort Training Session 7 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Cohort Training Session 8 (Topic TBD)	Week 14	Week 18	Albany, AF	
	Integration Training Session 1	Week 14	Week 18	Albany, AF	
	Integration Training Session 2	Week 14	Week 18	Albany, AF	
	Integration Training Session 3	Week 14	Week 18	Albany, AF	
	Goal and IPP Check-in Session	Week 14	Week 16	Albany, AF	
	Training and Training Materials Deliverable	Week 10	Week 18	AF	
	Admin	Week 10	Week 18	-	
	Project Management - Training	Week 10	Week 18	AF	
	Action Items Training	Week 10	Week 18	Albany, AF	
1.7	Grant Seeker Deployment	Week 17	Week 18	-	1.6,2,3
	Pre-Go Live Support	Week 17	Week 18	AF	
	Go Live	Week 17	Week 18	Customer, AF	
	Admin	Week 17	Week 18	AF	
	Meetings	Week 17	Week 18	-	
	Action Items Deployment	Week 17	Week 18	Albany, AF	
	Transition / End of Implementation Meeting	Week 17	Week 18	Albany, AF	
	Action Items Deployment	Week 17	Week 18	Albany, AF	
1.8	Additional Agency Configuration (TBD)	Week 9	Week 18	-	
	Discovery	Week 9	Week 18	Albany, AF	
	Design	Week 9	Week 18	Albany, AF	
	Configuration	Week 9	Week 18	Albany, AF	
	Testing	Week 9	Week 18	Albany, AF	
	Deployment	Week 9	Week 18	Albany, AF	
2	Integrations	Week 9		-	
	Admin	Week 2	Week 5	AF	
	Establish formal sub-project plan	Week 2	Week 5	AF	
	Interface Mapping	Week 2	Week 5	AF	
	Testing Plan	Week 2	Week 5	AF	
	Customer signoff of sub-project plan	Week 2	Week 5	Albany	
	Discovery Meetings	Week 2	Week 5	-	

	Interface Session 1	Week 2	Week 5	Albany, AF	
	Interface Session 2	Week 2	Week 5	Albany, AF	
	Design	Week 6	Week 8	-	
	Mapping documentation for interface	Week 6	Week 8	AF	
	Configuration	Week 9	Week 12	-	
	Execute against technical activities	Week 9	Week 12	AF	
	Testing	Week 9	Week 12	-	
	Execute Testing Plan	Week 9	Week 12	Albany, AF	
	Remediate, as required	Week 10	Week 12	Albany, AF	
	Action Items Deployment	Week 10	Week 12	Albany, AF	
	Signoff on Grant Seeker Integration	Week 12	Week 14	Albany	
3	Post-Go Live Support Activities (to be determined)	Week 18	Week 26		
	Post-Go Live Support Activities (to be determined)	Week 18	Week 26		
	Additional Reporting Configuration (TBD)	Week 18	Week 26	-	1.8
	Discovery	Week 18	Week 26	Albany, AF	
	Design	Week 18	Week 26	Albany, AF	
	Configuration	Week 18	Week 26	Albany, AF	
	Testing	Week 18	Week 26	Albany, AF	
	Deployment	Week 18	Week 26	Albany, AF	
5	Implementation Closeout Activities	-	-		all
	Project Closeout Activities	Week 25	Week 26	AF	
	Completed IPP	Week 25	Week 26	AF	
	Completed Training Plan	Week 25	Week 26	AF	
	Review and Confirm Project Closeout Activities	Week 25	Week 26	Albany, AF	
	Project Closeout Activities Sign-Off	Week 25	Week 26	Albany, AF	
	Transition from Implementation to Customer Success	Week 25	Week 26	Albany, AF	
	Warranty Acknowledgement (end of Implementation through Contract)	ongoing	ongoing	Albany, AF	

Scope of Services

Scope of Services – Grants Management and Planning

The System shall feature a centralized grant management and planning capability. This capability shall include:

- **Maintenance of embedded workflows and online applications;**
- **Creation and Maintenance of various System data-input forms pertinent to the grant seeking process;**
- **Ability to create standard and custom reports, dashboards, activity reports within application.**
- **Ability to track grant data and identify key metrics and trends.**

AmpliFund is proposing our Grant Seeker solution which includes all the features and functionality that the County will need to manage their grant programs successfully and efficiently.

When the County is acting as a Grant Seeker, AmpliFund allows unlimited number of users to manage the entirety of the process including identifying opportunities, tracking program performance/budgetary data, and reporting capabilities to be filtered up to the funder. All grant activities including internal ones are captured in the system for auditing purposes. AmpliFund offers a built-in research tool that provides access to over 240,000 funding sources and 10,000 active grants, including Federal, State, corporate, private foundation, and Grants.gov opportunities. Once identified, the opportunities are seamlessly converted to a pre-award grant where staff can collaborate on initial steps of the process: creating schedules contained in a centralized calendar, identifying writers and SMEs, and planning out program/budgetary goals. The AmpliFund WorkFlow Engine can be configured to include the current business processes and is fully configurable to meet the specific needs of the County. As the system of record, the County will be able to build all customized reports in addition to the standard reports common for grants on both the state and federal level.

Whatever requirements the County has related to grant activity, AmpliFund Grant Seeker is the intuitive and efficient solution that saves resources including both time and funds.

In AmpliFund, users can access a centralized organizational calendar for system and user created tasks and important grant dates, these tasks will automatically send emails to notify users of being created as well as providing reminders when deadlines are upcoming. Users can subscribe to the AmpliFund calendar to sync deadlines and key dates to their work or personal calendars. Users are automatically notified of workflow assignments, tasks, actions, and reminders by email.

AmpliFund's custom forms and fields allow for the addition of fields to any record, allowing users to customize the record to capture all necessary key information. The County can further enforce standardization of business processes by incorporating globally required



fields for all records created within the system. The AmpliFund Form Builder allows organizations to create fully customized data collection forms or add fields to existing elements of the system and supports multiple types of fields such as file uploads, drop down lists, checkboxes, and text fields. Fields may be marked as required, and the labels and field order are fully customizable.

AmpliFund allows for the creation and publication of custom reports with the included Report Builder. All organizational data is available within the AmpliFund data mart to be queried and visualized through the interactive reporting tool. 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.

AmpliFund records an audit trail of all user activity within the system, including unique user ID and a date-time stamp 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 to closeout.

Scope of Services – Search and Prospecting

The System shall facilitate the search for external grant opportunities and would incorporate searches into a prospecting clearinghouse accessible by all system users. These searches should take advantage of system-to-system web-based utilities such as that offered by Grants.gov. Ideally, the system should link the search function to the grants approval process and eventually the grants application and award process.

AmpliFund has a dedicated Research Module with the widest-reaching source of grant opportunities, representing billions in funding from roughly over 240,000 funding sources and 10,000 active grants. AmpliFund offers the most comprehensive database of current funding opportunities. The Research tool provides access to over 4,000 federal, state, municipal, and local government opportunities, including all NOFOs available on grants.gov, as well as over 200,000 independent, community, and corporate foundation grant makers.

Using proprietary research technology, combined with a large team of researchers who collect opportunities from thousands of different sources and data feeds, AmpliFund adds new grant opportunities daily to ensure the County has access to the most recent funding information. Users can identify opportunities that meet the needs of their projects by defining search criteria based on keywords, assistance listing numbers, grant subject, funding agency, and preferred submission window. The search tool will notify you when new opportunities meeting the search criteria are identified to ensure you can act on every funding opportunity.

AmpliFund is unique in the industry because our robust search engine is that search criteria fields can be customized in conjunction with AmpliFund's Implementation Team to meet the



specific needs and requirements of the County. These criteria can be saved, shared, and ultimately used again to continue searching for relevant grant opportunities. Users are notified automatically when grants that meet saved search criteria are posted. Each opportunity that meets the specific criteria can be saved and returned to later in a centralized repository. This includes the ability to find existing grants and the ability to see the current grant status.

From there, users can use that saved search to seamlessly be converted into a pre-award grant application. The opportunity automatically populates an AmpliFund pre-award grant with details, key dates, and deadlines. All grant deadlines and deliverables are then tracked on a centralized, organizational calendar. This automation is linked for the life of the grant, including the approval process, the grant application and work therein, and ultimately the award process.

Scope of Services – Grant Seeking

The System shall facilitate management of the grant seeking process. The System shall at a minimum, offer features that streamline and track activities associated with:

- **Applying for grants;**
- **Supplying documentation and other materials to grantors;**
- **Award notification;**
- **Invoicing for awarded funds. System features also include, where possible, system-to-system integration, such as that offered by <https://grants.gov>, with external grantor systems.**
- **Integration with Internal County Systems. The System shall feature system-to-system integration with internal County system platforms wherever possible. Integrations would include Tyler Technologies (Munis) to the County's General Ledger (GL), and Accounts Payable (AP) modules.**

Applying for Grants

Selected opportunities can be seamlessly converted into a pre-award grant application. The opportunity automatically populates an AmpliFund pre-award grant with details, key dates, and deadlines. All grant deadlines and deliverables are then tracked on a centralized, organizational calendar. This automation means more grant revenue opportunities with less work – expanding capacity and improving the County'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 the post-award section of AmpliFund for ongoing management of the grant.

Grant applications can be reviewed and approved at multiple stages before submission. Users then set reminders and alerts for key submission dates. Applications, supporting documents, internal reviewer notes, and funder communication and documentation are



stored in one centralized location. Each grant can be a given unique identifier. Once completed, application materials are downloaded and submitted to the grantor's application site. Each application is stored and is easily accessible in the future.

Supplying Documentation

Once an opportunity is awarded, AmpliFund offers a simple transition to post-award. From there, award details can be updated or amended to accommodate contract negotiations. All final executed contracts will be stored in a single centralized location. AmpliFund makes it easy to manage the County's portfolio of open funding opportunities, track submission statuses, and report on solicitation success rates.

Award Notification

Upon award, the grant is changed to "approved" status. Users can begin tracking budget and project goals against contract terms. Award notifications will allow users to update grant info to accurately reflect awarded amounts for a specific opportunity.

Communications regarding notifications can also be adjusted throughout the life of the grant reflecting any changes relating to the grant.

Invoicing for Awarded Funds

Throughout the grant application process, the County users will be able to create a grant record that is created and set up for grant pre-award activities with requisite invoicing. Users will be able to collaborate on creating budgets and project goals to be submitted to the original grant application portal. AmpliFund does not allow for the direct submission of grants an integration with another program, such as that from grants.gov. AmpliFund allows for all budget and project data, including invoicing, to be stored in a single location. Data the County submits in a grant application will automatically be turned into a budget to begin tracking against spending in AmpliFund. This can only be done once the status of a grant is changed to "approved".

Once the status of an award is changed to "approved", the budget will be active and ready to be fully built upon awarding. Budget data can then be added, assigned, modified, or amended throughout the life of the grant. Users can use the built-in amendment features to track budget and change requests for approvals. They can also use AmpliFund's Workflow Engine to route grant budget changes for review and approval, and capture decisions and changes.

Throughout the life of the grant, the County users will be able to track expenses and accurately track spending as well as compliance in the allocation of different funds for specific purposes. Users can define the expected allocation of budget line items across the life of the grant either by grant year or by month. Users can track the entire cash flow and invoice process accordingly for a grant from planned budget, expense reconciliation, payment request to cash receipt.



Integration with Internal County Systems

AmpliFund has a REST web-based API available to integrate with existing financial systems, such as Tyler Technologies Munis ERP. AmpliFund is platform agnostic and can integrate with most systems that have an API available.

AmpliFund has extensive experience conducting integrations with a multitude of software systems through an existing REST API. AmpliFund has considerable experience integrating with state and county-level systems and portals for use cases surrounding all aspects of the grant lifecycle that grant seekers have necessitated. AmpliFund has partnered with Workato, a best-in-class iPaaS solution, to shift our approach from *developing* each new integration to *configuring each integration*, greatly reducing time to value and ensuring we can keep up with the demands of the market.

The client's GL Codes/chart of accounts is first imported into AmpliFund to facilitate data mapping and budget configuration. Grants and their budgets are established in AmpliFund. Grants are tagged with the proper Grant Financial Code to align with the corresponding Grant/Project identifier in the client's financial system.

Note: Grant Financial Code is referred to in a variety of ways depending on the client, their financial system, and their specific use of fields in the financial system. The goal is to ensure we have an identifying element to link to any expense transaction in the financial system and what grant or project it is associated with.

The next step is to apply the associated GL-Code(s) to all Grant Budget Items in AmpliFund that expenses will post against. For both the SFTP and Expense Import approach, two (2) options are available. Both are handled via export tools or report designers available in all common financial systems. The County will create a mapping template in AmpliFund against a consistent format being exported from their financial system and the County will generate an export from their system that aligns with the AmpliFund Expense Import Template.

Scope of Services – Full Grants Management Lifecycle

- **Dashboards for tracking and managing applied for and existing grants**
- **Tools for tracking and oversight of Grant Objectives, Grant Activity, Grant Partners, Grant Budgets, Grant Programs and Funds, and Grant Documents**
- **Reporting capabilities**
- **Subrecipient monitoring capabilities**
- **Notifications of upcoming deadlines**
- **Assignment of responsibilities and user permissions**
- **Specific workflows with accountability checks to be tailored to specific grants or County needs**
- **Accessibility to required materials for reimbursement requests**
- **Close-Out and Archiving of Grants**

Dashboards

AmpliFund's built-in Reporting Engine provides out of the box dashboards and reports for all users providing transparency throughout all of the processes that are necessary during the grant lifecycle. The Reporting Engine also provides flexibility for the County with the ability to create custom dashboards and reports on any of the data being collected throughout AmpliFund. AmpliFund's Dashboards and Reports are tailored to a user's specific security role. User security roles ensure users are seeing the most relevant information for them. An Organizational Administrator, who has oversight across the entire system, may utilize the Overall Grant Dashboard, as seen in , to easily understand Figure 1, a grant's usage across the County. Whereas a Grant Manager may utilize a Grant Analytics Dashboard, which can be viewed in the image below, to understand the usage of an individual grant across the financial, programmatic, and task based requirements.

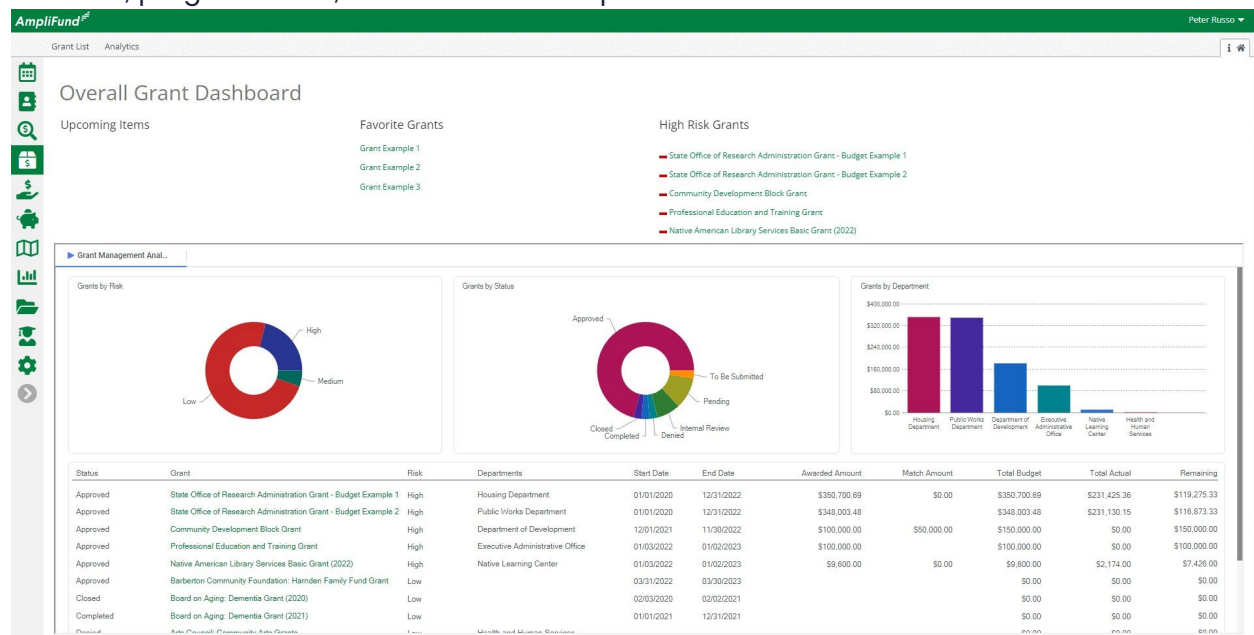


Figure 1 – Overall Grant Dashboard with analytic representations of performance.



Tracking Tools

AmpliFund is purpose built to manage and track all aspects of grants and seamlessly conform and report on funder requirements. AmpliFund's grant record structure ensures standardization across the County to ensure all grants have established Objectives, Budgets, Programmatic Plans, and relevant Documents. When a grant is created or imported into the system, users can establish grant start and end dates, reporting period schedules, total grant budget, ensure reminders are established, User access and assignments are delegated to appropriate individuals, and identify relevant grant partners and funders.

Each grant record has both financial and programmatic sections allowing in-depth tracking of budgets and performance plans for the tracking of actual expenditures and achievements towards performance goals. When establishing a grant budget, users will have the option to create budget categories and define compliance requirements such as total budgeted amount per category, set expense caps per category, and configure usage of non- grant funded dollars. To further define and track grant budgets, line items can be added underneath budget categories. Line items also enable the usage of total budgeted amounts, expense caps, and configuration of non-grant funded dollars. County users establish and define grant objectives through AmpliFund's Grant Performance Plan where grant objectives and goals can be defined. When adding a Grant Objective, users can utilize one of six methods of objective tracking including Milestone, Narrative, Numeric, Percent Achieved, Percent Changed, and Reimbursement types. Additionally, the County can add custom forms and fields to ensure the proper tracking of programmatic goals and objectives. Responsible Individuals can be assigned to each grant budget line item and grant objective to ensure the setup and tracking of actual expenses and achievements are occurring properly.

As the program that the grant is funding progresses, actual usage data such as grant expenses and grant achievements towards the budget and objects can be logged on the grant record and/or be integrated in from other software sources, such as a financial system. Grant documentation can also be uploaded and attached to the grant record throughout its lifecycle, from application to final audit reporting. Each grant record contains its own documents folder which users with the appropriate security roles can access.



Below you will find several examples of what the County would see when establishing a Grant Record within AmpliFund.

AmpliFund®

AmpliFund Grantee ▾ Peter Russo ▾

Details Analytics Pre-Award ▾ Post-Award ▾ Tools ▾ Grant Workflow ▾ Custom ▾

Community Development Block Grant (CDBG) Program – Performance Plan

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

Name	Goal Type	Responsible Individual	Strategy
Submit report on status	📌 📊 📅 Milestone	Matt Athens	Community Engagement and Education
Hold 12 Monthly Local Citizen Meetings	📌 📊 📅 Numeric	Kerry Houston	Re-utilizing Vacant Land
Yellowfield Neighborhood Inspections (300)	📌 📊 📅 Numeric	Kerry Houston	Code Enforcement and Home Repair
Yellowfield Neighborhood Property Rating (15)	📌 📊 📅 Numeric	Kerry Houston	Retail/Commercial Revitalization
Develop Revitalization Plan	📌 📊 📅 Milestone	Keith Austin	Code Enforcement and Home Repair
Obtain Competitive Contractor Bids for Commerical Projects	📌 📊 📅 Numeric	Keith Austin	
Develop Vacant Lot Pocket Park Plans	📌 📊 📅 Milestone	Karl Dallas	Retail/Commercial Revitalization
Select Pocket Park Plan Finalists	📌 📊 📅 Narrative	Keith Austin	
Identify contractor for construction management	📌 📊 📅 Milestone	Karl Dallas	Re-utilizing Vacant Land
Decrease vandalism in jurisdiction D	📌 📊 📅 Percentage Changed	Jared Vail	
Hire program Coordinator	📌 📊 📅 Milestone	Peter Russo	Code Enforcement and Home Repair
Holding Classes	📌 📊 📅 Numeric	Edwin Tallahassee	Community Engagement and Education
Describe changes in the last 12 months	📌 📊 📅 Narrative	Peter Russo	Retail/Commercial Revitalization

Figure 2 – Grant Objectives

AmpliFund®

AmpliFund Grantee ▾ Peter Russo ▾

Details Analytics Pre-Award ▾ Post-Award ▾ Tools ▾ Grant Workflow ▾ Custom ▾

Community Development Block Grant (CDBG) Program – Budget

Start: 7/1/2016 End: 6/30/2021

Budget View Settings

View By

Category ▾ Project ▾ Recipient

Options

☐ Project ☐ Recipient ☒ Grant Year ☒ Line Items ☒ Responsible Individuals ☒ GL Accounts ☒ Match

Budget

Expense Budget +

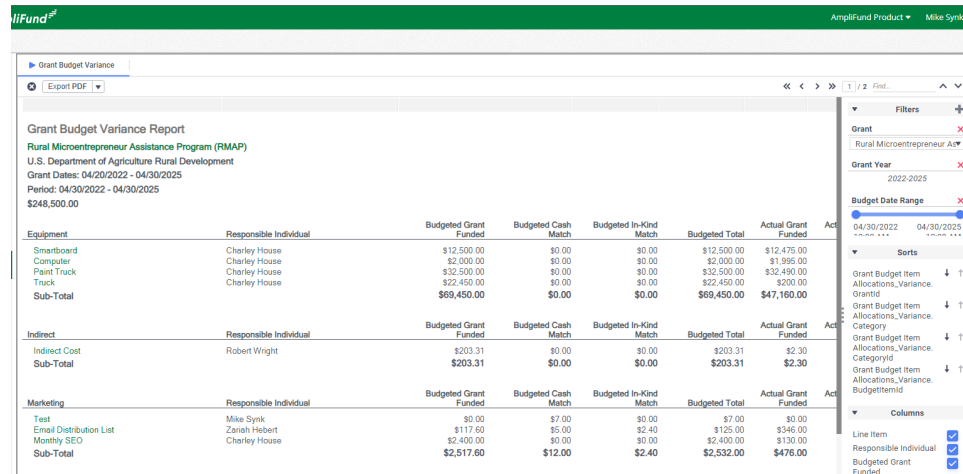
	Responsible Individual	GL Account	Year 1	Year 2	Year 3	Year 4	Year 5	Grant Funded	Match	Total Cost
Construction +										
Backhoe Rental	Karl Dallas	Equipment Rental - 201_59001_01 - CDPG (Ohio)	\$2,735.60	\$2,735.60	\$2,735.60	\$2,735.60	\$2,735.60	\$6,178.00	\$7,500.00	\$13,678.00
Bulldozer Rental	Karl Dallas	Equipment Rental - 201_59002_02 - CDPG (Ohio)	\$2,542.80	\$2,542.80	\$2,542.80	\$2,542.80	\$2,542.80	\$7,214.00	\$5,500.00	\$12,714.00
Playground Equipment	Karl Dallas	Playground Equipment - 201_59100_00 - CDPG (Ohio)	\$5,705.80	\$5,705.80	\$5,705.80	\$5,705.80	\$5,705.80	\$18,529.00	\$10,000.00	\$28,529.00
Tractor Rental	Karl Dallas	Equipment Rental - 201_59003_03 - CDPG (Ohio)	\$993.70	\$1,987.40	\$1,987.40	\$1,987.40	\$1,987.40	\$9,937.00	\$0.00	\$9,937.00
Subtotal			\$11,977.90	\$12,971.60	\$12,971.60	\$12,971.60	\$12,971.60	\$41,858.00	\$23,000.00	\$64,858.00
Consultants/Contracts +										
Consultants - Project Manager	Kyle Sanantonio	Consultants - 201_03491_48 - CDPG (Ohio)	\$11,582.30	\$23,164.60	\$23,164.60	\$23,164.60	\$23,164.60	\$115,823.00	\$0.00	\$115,823.00
Property Contractor - Building	Kyle Sanantonio	Consultants - 201_03490_48 - CDPG (Ohio)	\$2,827.30	\$5,654.60	\$5,654.60	\$5,654.60	\$5,654.60	\$28,273.00	\$0.00	\$28,273.00
Property Contractor - Demolition	Kyle Sanantonio	Consultants - 201_03489_48 - CDPG (Ohio)	\$69,424.20	\$69,424.20	\$69,424.20	\$69,424.20	\$69,424.20	\$347,121.00	\$0.00	\$347,121.00
Subtotal			\$83,833.80	\$98,243.40	\$98,243.40	\$98,243.40	\$98,243.40	\$491,217.00	\$0.00	\$491,217.00
Personnel +										
Karl Dallas	Kyle Sanantonio	Personnel - 201_03487_42 - CDPG (Ohio)	\$5,908.86	\$5,908.87	\$5,908.87	\$5,908.87	\$5,908.87	\$29,544.34	\$0.00	\$29,544.34
Fringe Benefits		Personnel - 201_03487_42 - CDPG (Ohio)	\$256.35	\$256.35	\$256.35	\$256.35	\$256.35	\$1,281.75	\$0.00	\$1,281.75
Medical Benefits		Personnel - 201_03487_42 - CDPG (Ohio)	\$166.63	\$166.63	\$166.63	\$166.63	\$166.63	\$833.14	\$0.00	\$833.14
Retirement Benefits		Personnel - 201_03487_42 - CDPG (Ohio)	\$358.89	\$358.89	\$358.89	\$358.89	\$358.89	\$1,794.45	\$0.00	\$1,794.45
Keith Austin - Projects Coordinator	Kyle Sanantonio	Personnel - 201_03487_42 - CDPG (Ohio)	\$8,690.00	\$17,380.00	\$17,380.00	\$17,380.00	\$17,380.00	\$86,900.00	\$0.00	\$86,900.00
Kerry Houston	Kyle Sanantonio	Personnel - 201_03487_42 - CDPG (Ohio)	\$2,367.92	\$2,367.92	\$2,367.92	\$2,367.92	\$2,367.92	\$11,839.63	\$0.00	\$11,839.63
Fringe Benefits		Personnel - 201_03487_42 - CDPG (Ohio)	\$102.73	\$102.73	\$102.73	\$102.73	\$102.73	\$513.65	\$0.00	\$513.65
FICA Rate Benefits		Personnel - 201_03487_42 - CDPG (Ohio)	\$66.77	\$66.77	\$66.77	\$66.77	\$66.77	\$333.87	\$0.00	\$333.87
Retirement Benefits		Personnel - 201_03487_42 - CDPG (Ohio)	\$143.82	\$143.82	\$143.82	\$143.82	\$143.82	\$719.11	\$0.00	\$719.11
Kyle Sanantonio - Project Sponsor	Kyle Sanantonio	Personnel - 201_03487_42 - CDPG (Ohio)	\$7,238.98	\$14,477.96	\$14,477.96	\$14,477.96	\$14,477.96	\$72,389.80	\$0.00	\$72,389.80
Subtotal			\$24,205.76	\$40,134.75	\$40,134.76	\$40,134.76	\$40,134.76	\$200,673.77	\$0.00	\$200,673.77
Publication Costs +										
Community Education Materials	Kerry Houston	Print Materials - 201_48402_00 - CDPG (Ohio)	\$5,402.40	\$5,402.40	\$5,402.40	\$5,402.40	\$5,402.40	\$27,012.00	\$0.00	\$27,012.00

Figure 3 – Grant Budgets

Figure 4 – Grant Documents

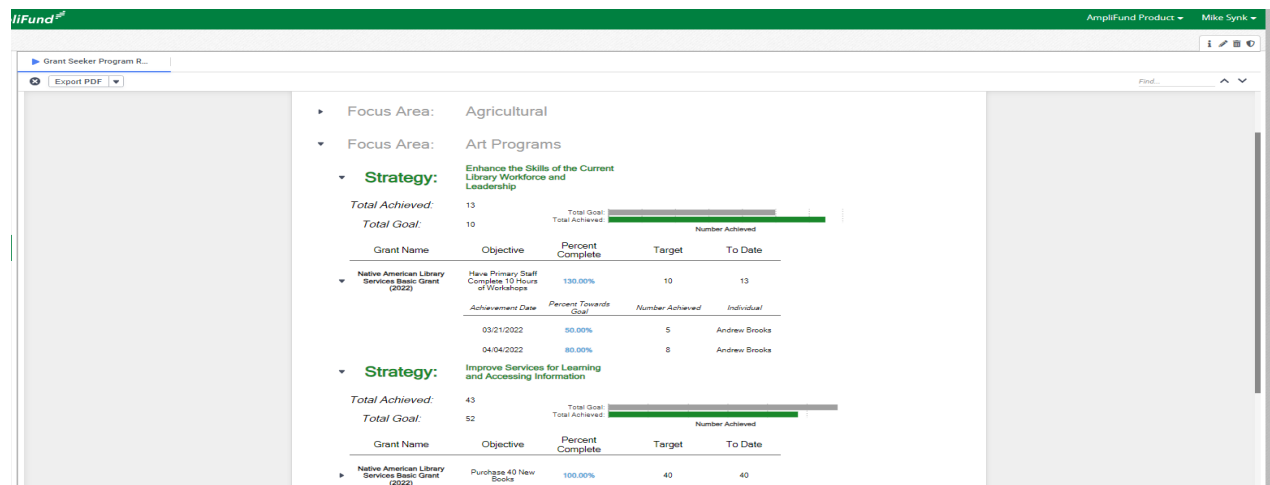
Reporting Capabilities

AmpliFund allows for the creation and publication of custom reports with the included Report Builder. All organizational data is available within the AmpliFund data mart to be queried and visualized through the interactive reporting tool. 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. Sub grantees who purchase an expanded license can access the report designer and create custom reports.



Equipment	Responsible Individual	Budgeted Grant Funded	Budgeted Cash Match	Budgeted In-Kind Match	Budgeted Total	Actual Grant Funded
Smartboard	Charley House	\$12,500.00	\$0.00	\$0.00	\$12,500.00	\$12,475.00
Computer	Charley House	\$2,000.00	\$0.00	\$0.00	\$2,000.00	\$1,995.00
Paint Truck	Charley House	\$32,500.00	\$0.00	\$0.00	\$32,500.00	\$32,480.00
Truck	Charley House	\$22,450.00	\$0.00	\$0.00	\$22,450.00	\$200.00
Sub-Total		\$69,450.00	\$0.00	\$0.00	\$69,450.00	\$47,160.00
Indirect						
Indirect Cost	Robert Wright	\$203.31	\$0.00	\$0.00	\$203.31	\$2.30
Sub-Total		\$203.31	\$0.00	\$0.00	\$203.31	\$2.30
Marketing						
Test	Mike Sytk	\$0.00	\$7.00	\$0.00	\$7.00	\$0.00
Email Distribution List	Zariah Hebert	\$117.60	\$5.00	\$2.40	\$125.00	\$346.00
Monthly SEO	Charley House	\$2,400.00	\$0.00	\$0.00	\$2,400.00	\$130.00
Sub-Total		\$2,517.60	\$12.00	\$2.40	\$2,532.00	\$476.00

Figure 5 – Grant Budget Variance Report



Grant Name	Objective	Percent Complete	Target	To Date
Native American Library Services Basic Grant (2022)	Have Primary Staff Complete 10 Hours of Workshop	130.00%	10	13
	Achievement Date	Percent Towards Goal	Number Achieved	Individual
	03/21/2022	50.00%	5	Andrew Brooks
	04/04/2022	80.00%	8	Andrew Brooks
Strategy:				
Improve Services for Learning and Accessing Information				
Total Achieved:				
Total Goal:				
Grant Name	Objective	Percent Complete	Target	To Date
Native American Library Services Basic Grant (2022)	Purchase 40 New Books	100.00%	40	40

Figure 6 – Configured Report Example



Subrecipient Monitoring

AmpliFund allows the County's users to monitor and document all subrecipient activity. This is accomplished by creating established checklists that can be changed throughout the contract for the County via the use of AmpliFund's custom forms and fields. These checklists can include all subrecipient phases for a grant including application progress, reporting, reimbursements, and supporting documentation that has been submitted correctly.

Deadline Notifications

AmpliFund's communication functionality allows the County to receive automated notifications and built-in progress tracking. AmpliFund allows the County to insert specific phone numbers and emails to act as a designated point of contact for each grant opportunity. Several progress trackers including a simple Progress Tracking bar at the top of an application as well as alert notifications to ensure that the County stays on track and never misses an important step or deadline. These notifications happen both internally as well as email notifications.

User Permissions

AmpliFund utilizes role-based security to provide users access and permissions to modules, features, and records within the system. System roles are predefined. Users can also be granted elevated permissions for various access points within the application by setting permissions at the object level. A user, for example, can be added to a grant as a grant manager, which would elevate the user permissions for that particular grant. AmpliFund provides the ability to delegate internal users to different groups and programs including department level and program level permissions.

Administrators have access to additional features and functionality that allows for system maintenance tasks such as record restore capabilities, the ability to manage password complexity/expiration requirements, etc. Administrators also have access to user activity and audit logs, which track logins, object modification, and workflow activity.

Administrators can fully manage user accounts and enable/disable accounts at any time. They can also manage password complexity requirements (minimum length, capital letters, numbers, special characters, etc.) as well as password expiration and reuse policies.

System administrators have access to users' privileges and access. Administrators have access to additional features and functionality that allows for system maintenance tasks such as record restore capabilities, the ability to manage password complexity/expiration requirements, etc. Administrators also have access to user activity and audit logs, which track logins, object modification, and workflow activity.



Configurable Workflows

AmpliFund's Workflow Engine supports the creation of an unlimited number of workflows that the client can utilize. These workflows can be used for a variety of business processes including tracking approvals and documenting departmental needs. With Grant Seeker, the AmpliFund Implementation Team will configure these workflows.

AmpliFund's Workflow Engine is designed to automate time-consuming processes across the entire grant lifecycle, ensuring compliance and freeing valuable resources to focus on driving impact, not doing paperwork. The AmpliFund Workflow Engine is extremely flexible and can be configured directly through the user interface, resulting in a reduction of errors often associated with existing manual, paper-based processes. Workflows can be configured to support standardized processes that result from the Interagency Business Process Workshops related to grants, invoices, amendments, applications, financial and performance reports, and these workflows can be used to capture electronic approvals and ensure adherence to approved business processes. User permissions are applied to both actions and queues defined in the workflow to limit availability to specific users or groups of users.

AmpliFund records an audit trail of all user activity within the system, including unique user ID and a date-time stamp 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.

Reimbursement Requests

AmpliFund provides numerous features to ensure County staff can track and manage grant funds, budget data, including reimbursement requests. AmpliFund has the ability to process financials and manage budget expenditures and applicable documentation. These features can be configured during implementation to ensure that reimbursement requests are tracked when submitted.

Close-Out and Archiving of Grants

AmpliFund provides standardization of grant processes to assist the County in defining their own closeout and archiving procedures utilizing AmpliFund's workflow engine. The close-out of each grant can be unique due to funder and/or County requirements, AmpliFund provides the County with a built-in Workflow Engine to establish close-out procedures across the various grants, departments, and programs within the County. Departments A may have one or more workflows that ensure final reports are downloaded and submitted and appropriate department sign off is achieved, whereas Department B may have more complex workflows that incorporate legal and financial reviews.

AmpliFund natively stores all the County's data indefinitely and again provides the County the ability to define their own archiving procedures. AmpliFund ensures the software is not a barrier by supporting unlimited storage and usage of the grants management system.

Below you will see an example of a pre-approval grant workflow that displays its work queues and individual action items.

The screenshot displays the AmpliFund interface for a "Pre-Award Approval Workflow". The top navigation bar includes "Details" and "Workflow Queues". A sidebar on the left contains various icons for navigation. The main content area is titled "Pre-Award Approval Workflow" and "Workflow Queues". Below this, there is a section "Add Workflow Queue +" followed by a list of workflow queues, each with a dropdown arrow, a plus icon, an edit icon, and a delete icon.

- Pre-Award Approval Go / No Go from Department Head**
 - Review Opportunity
 - Approved: Will Send to Budget Development Stage
 - Remove Opportunity from workflow
- Budget Development**
 - Create Pre-Award Budget
 - Approved: Send to Preparation of Supporting Documents
 - Declined: Send Back to Approval Stage
 - Remove from Workflow
- Preparation of Supporting Documents**
 - Prepare Supporting Documentation and Upload for Final Review
 - Approved: Send to Final Review
 - Declined: Send Back to Budget Development
 - Declined: Send Back to Approval Stage
 - Remove from Workflow
- Final Approval**
 - Remove from Workflow

Figure 7 – Sample Workflow built in AmpliFund's intuitive Workflow Engine

Section V

Cost Proposal

Quote Expires: November 18th, 2023

AmpliFund's Recommended Approach: County-Wide Purchase

A County-Wide purchase provides Albany with the following value:

- Centralization and Consistency – Seamlessly transition departments (or Cohorts) to drive common, newly developed business processes.
- Standardization – Limit the potential risks of compliance through a uniform standard process. Enable departments to have flexibility to leverage our software in a manner that suits their needs, while ensuring departments have a standard methodology of managing funding on a single-uniformed system.
- Configuration – Departments often face similar challenges and needs in terms of configuring AmpliFund for their best use-case. Streamlined communication during implementation leads to better long-term outcomes leveraging an all-in-one tool like AmpliFund.

Savings and ROI

AmpliFund provides significant cost savings for county-wide contracts. As noted in the quote below, the cost for all departments, whether you would implement in Cohorts or choose to do one-single implementation, has significant cost saving implications.

AmpliFund is presenting a unique, scaling pricing model for the County that recognizes that additional Cohorts (of one or more departments) may implement overtime. This model allows for all departments to gain access to the system without the need to develop new contracts when additional departments or Cohorts are prepared for implementation.

The scaling model incentivizes the County to drive adoption within the first two years of the agreement to maximize value of the scaling County-wide pricing presented below.

Note:

The large variance between the low and high quantity of implementation hours is driven by the uncertainty of the degree that departments within any given Cohort may or may not standardize requirements and business processes across the County. The low quantity assumes standardized processes – and thereby common configuration needs – across all departments, while the high quantity assumes some degree of unique departmental requirements and configurations. As an example:

- Should all departments in Cohort #1 and future Cohorts adopt standardized business processes, the County can expect implementation hours to total at or near 210 hours.

- Should all departments in Cohort #1 adopt standardized processes but future cohorts require a degree of variability to those processes, the County can expect implementation hours to total closer to 435 hours [130-235 hours for Cohort 1 + up to 200 hours for the subsequent Cohorts].

AmpliFund Grant Seeker: County-Wide Pricing

SaaS License Fee for Managing up to \$140M in Annual Grants Revenue

Year 1 (One) Year	\$40,000.00
Year 2 (Two) Year	\$55,000.00
Year 3 (Three) Year	\$70,000.00
Year 4 (Four) – Option Year	\$73,500.00
Year 5 (Five) – Option Year	\$77,175.00
Total 3 (Three) Year SaaS License Fee	\$165,000.00
Total 5 (Five) Year Forecasted SaaS License Fee; 3-Year Contract	\$315,675.00
Total 5 (Five) Year SaaS Forecasted License Fee; 5-Year Contract	\$305,000.00

Implementation Services – Budgetary Estimates

Item	Quantity Low	Quantity High	Unit of Measure	Unit Price	Estimated Pricing Low	Estimated Pricing High
Project Management (Cohort 1)	15	25	hours	\$150.00	\$2,250.00	\$3,750.00
Requirements Gathering (Cohort 1)	40	80	hours	\$150.00	\$3,000.00	\$6,000.00
Implementation (Cohort 1)	25	40	hours	\$150.00	\$3,750.00	\$3,750.00
Product Training (Cohort 1)	20	80	hours	\$150.00	\$3,000.00	\$3,000.00
Departmental Configuration and Testing (Cohort 1)	75	150	hours	\$150.00	\$3,750.00	\$15,000.00
API Integration Setup Fee (Cohort 1)	One-time configuration fee to connect AmpliFund to financial system (25 hours).				\$3,750.00	\$3,750.00
Total (Cohort 1)	130	235	--	--	\$19,500.00	\$35,250.00
Additional Cohort Implementation	80	200	--	--	\$12,000.00	\$30,000.00
Total County-Wide Implementation Fee	210	435	--	--	\$31,500.00	\$65,250.00

Total Fee Estimation for Subscription and Implementation

Total 3 (Three) Year Contract Fee	\$196,500.00–\$230,250.00
Total 5 (Five) Year Forecasted Fee on a 3-Year Contract	\$347,175.00–\$380,928.00
Total 5 (Five) Year Contract Fee	\$336,500.00–\$370,250.00

Optional Add-Ons

Item	Description	Cost
On-Site Training Fee	On-site travel can be provided to expedite implementation timelines.	~\$8,000.00



Albany County Requested Quote: Cohort #1 Pricing

AmpliFund's Cohort #1 pricing can be found in the quote on the following page. Cohort #1 pricing gives the cohort-specific pricing of up to \$30M in annual grants managed and up to 60 active grants managed.

Note: The large variance between the low and high quantity of implementation hours is driven by the uncertainty of the degree that departments within Cohort #1 may or may not standardize requirements and business processes across the County departments. The low quantity assumes standardized processes – and thereby common configuration needs – across all Cohort #1 departments, while the high quantity assumes some degree of unique departmental requirements and configurations. As an example:

- Should all departments in Cohort #1 adopt standardized processes, the County can expect implementation hours to total at or near 130 hours.
- Should all departments in Cohort#1 require a degree of variability to those processes, The County can expect implementation hours to total closer to 235 hours.

AmpliFund Grant Seeker: Cohort 1 Pricing

SaaS License Fee for Managing up to \$30M in Annual Grants Revenue

Year 1 (One) Year	\$30,000.00
Year 2 (Two) Year	\$30,000.00
Year 3 (Three) Year	\$30,000.00
Year 4 (Four) – Option Year	\$31,500.00
Year 5 (Five) – Option Year	\$33,075.00
Total 3 (Three) Year SaaS License Fee	\$90,000.00
Total 5 (Five) Year Forecasted SaaS License Fee; 3-Year Contract	\$154,575.00
Total 5 (Five) Year Forecasted SaaS License Fee; 5-Year Contract	\$150,000.00

Implementation Services – Budgetary Estimates

Item	Quantity Low	Quantity High	Unit of Measure	Unit Price	Estimated Pricing Low	Estimated Pricing High
Project Management	15	25	hours	\$150.00	\$2,250.00	\$3,750.00
Requirements Gathering	20	40	hours	\$150.00	\$3,000.00	\$6,000.00
Implementation	25	25	hours	\$150.00	\$3,750.00	\$3,750.00
Product Training	20	20	hours	\$150.00	\$3,000.00	\$3,000.00
Departmental Configuration and Testing	25	100	Hours	\$150.00	\$3,750.00	\$15,000.00
API Integration Setup Fee	One-time configuration fee to connect AmpliFund to financial system (25 hours).				3,750.00	3,750.00
Total	130	235	--	--	\$19,500.00	\$35,250.00

Total Fee Estimation for Subscription and Implementation

Total 3 (Three) Year Contract Fee	\$109,500.00–\$125,250.00
Total 5 (Five) Year Forecasted Fee on a 3-Year Contract	\$174,075.00–\$189,825.00
Total 5 (Five) Year Contract Fee	\$169,500.00–\$185,250.00

Optional Add-Ons

Item	Description	Cost
On-Site Training Fee	On-site travel can be provided to expedite implementation timelines.	~\$8,000.00

Assumptions:

- Pricing includes **unlimited user licenses, unlimited usage, unlimited subrecipient licenses, and unlimited document storage space.**
- **If the contract length is 4 years or longer, AmpliFund will waive the annual 5% increase for additional contracted years, as represented in the above quote.**
- Subscription costs include Grant Seeker expense integration using iPaaS provider, Workato, to move data weekly from a financial system at \$2,500 per year.
- SaaS License Cost includes AmpliFund technical support for organizations users, applicants, and recipient users.
- The SaaS License Cost must be paid in whole upfront, annually.
- Hosting will be provided in the AmpliFund Azure multi-tenant cloud environment.
- Additional service hours can be purchased at any time at a rate of \$175/hour. A discounted rate of \$150/hour has been provided due to purchasing hours in bulk.
- The SaaS License Cost will remain fixed for the initial term. For any Renewal Term following the Initial Term to which the parties mutually agree, AmpliFund may increase annual subscription license fees upon at least 90 days' prior notice to the commencement of the applicable Renewal Term based on AGR increases.
- AmpliFund will support the Customer with setting up a data connection from your existing financial system to AmpliFund by leveraging the iPass connection tool, Workato, to sync data once a week. API Integration setup efforts will start roughly 8 – 10 weeks after the Effective Date of the contract agreement due to financial management initial setup processes needing to take place in the system.
- *On-Site Training – AmpliFund finds tremendous value in our client implementations to come on-site and meet with our partners' implementation team. Not only is there time saved to get the implementation off and running, but we also find value working in person with our clients. Our typical days on site include taking a deep dive into the requirements gathering sessions, configuration and initial setup of the system during a 3-4 day span. The hours allotted in the total Implementation Services area of the cost proposal above would support the effort of AmpliFund staff. The On-Site Training Cost listed as an optional add-on above is specific to estimated travel costs for two Cleveland based individuals to come on site, including airfare, hotel, food, and rental car. On-Site Training fees would be billed at the completion of the On-Site Training project scope.

Section VI

Mandatory Documentation

Cost Proposal Form

Proposal Form – Acknowledgement of Addenda

Attachment A – The Non-Collusive Bidding Certificate

Attachment B – Acknowledgement by Proposer

Attachment C – Vendor Responsibility Questionnaire

Attachment D – Iranian Energy Divestment Certification

On the following pages, AmpliFund has provided the Mandatory Documentation as requested by the County in the RFP.

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
COUNTY OF ALBANY

COST PROPOSAL FORM

PROPOSAL IDENTIFICATION:

Title: Grant Management Software
RFP Number: 2023-088

PLEASE SUBMIT THIS FORM WITH YOUR PROPOSAL

COMPANY:	<u>StreamLink Software Inc. DBA AmpliFund</u>
ADDRESS:	<u>812 Huron Road, Suite 550</u>
CITY, STATE, ZIP:	<u>Cleveland, OH 44115</u>
TEL. NO.:	<u>216.377.5500</u>
FAX NO.:	<u>216.377.5501</u>
FEDERAL TAX ID NO.:	<u>27-1444897</u>
REPRESENTATIVE:	<u>Scott Smith</u>
E-MAIL:	<u>ssmith@amplifund.com</u>
SIGNATURE AND TITLE	<u> CEO</u>
DATE	<u>August 4th, 2023</u>

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COUNTY OF ALBANY

PROPOSAL FORM

PROPOSAL IDENTIFICATION:

Title: Grant Management Software
RFP Number: 2023-088

THIS PROPOSAL IS SUBMITTED TO:

Pamela O Neill, Purchasing Agent
Albany County Department of General Services
Purchasing Division
112 State Street, Room 1000
Albany, NY 12207

1. The undersigned Proposer proposes and agrees, if this Proposal is accepted, to enter into a Contract with the owner in the form included in the Contract Documents to complete all Work as specified or indicated in the Contract Documents for the Contract Price and within the Contract Time indicated in this Proposal and in accordance with the Contract Documents.
2. Proposer accepts all of the terms and conditions of the Instructions to Proposers, including without limitation those dealing with the Disposition of Proposal Security. This Proposal may remain open for ninety (90) days after the day of Proposal opening. Proposer will sign the Contract and submit the Contract Security and other documents required by the Contract Documents within fifteen days after the date of County's Notice of Award.
3. In submitting this Proposal, Proposer represents, as more fully set forth in this Contract, that:

- (a) Proposer has examined copies of all the Contract Documents and of the following addenda: (If none, so state)

Date	Number
July 26, 2023	#1
July 27, 2023	#2
August 2, 2023	#3
August 2, 2023	#4
August 3, 2023	#5
August 8, 2023	#6
August 11, 2023	#7

(receipt of all of which is hereby acknowledges) and also copies of the Notice to Proposers and the Instructions to Proposers;

- (b) Proposer has examined the site and locality where the Work is to be performed, the legal requirements (federal, state and local laws, ordinances, rules and regulations) and the conditions affecting cost, progress or performance of the Work and has made such independent investigations as Proposer deems necessary;

- (c) This Proposal is genuine and not made in the interest of or on behalf of any undisclosed person, firm or corporation and is not submitted in conformity with any agreement or rules of any group, association, organization or corporation; Proposer has not directly or indirectly induced or solicited any other Proposer to submit a false or sham Proposal; PROPOSER has not solicited or induced any person, firm or a corporation to refrain from Proposing; and Proposer has not sought by collusion to obtain for himself any advantage over any other Proposer or over the owner.

- 4. Proposer will complete the Work for the following prices(s): (Attach Proposal)
- 5. Proposer agrees to commence the Work within the number of calendar days or by the specific date indicated in the Contract. Proposer agrees that the Work will be completed within the number of Calendar days or by the specific date indicated in the contract.
- 6. The following documents are attached to and made a condition of this Proposal:
 - (a) Non-Collusive Bidding Certificate (Attachment “A”)
 - (b) Acknowledgment by Bidder (Attachment “B”)
 - (c) Vendor Responsibility Questionnaire (Attachment “C”)
 - (d) Iranian Energy Divestment Certification (Attachment “D”)
 - (e) Proposer Qualification Questionnaire (Attachment “E”)
- 7. Communication concerning this Proposal shall be addressed to:
 - _____
Connor Bergeron, Field Sales Executive
 - _____
cbergeron@amplifund.com
 - _____
 - Phone: 703.881.1321
- 8. Terms used in this Proposal have the meanings assigned to them in the Contract and General Provisions.

ATTACHMENT "A"
NON-COLLUSIVE BIDDING CERTIFICATE PURSUANT TO
SECTION 103-D OF THE NEW YORK STATE GENERAL MUNICIPAL LAW

A. By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organizations, under penalty of perjury, that to the best of knowledge and belief:

(1) The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other bidder or with any competitor.

(2) Unless otherwise required by law, the prices which have been quoted in this bid have not knowingly been disclosed by the bidder and will not knowingly be disclosed by the bidder, directly or indirectly, prior to opening, to any bidder or to any competitor.

(3) No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.

A bid shall not be considered for award nor shall any award be made where (1), (2), and (3) above have not been complied with; provided, however, that in any case the bidder cannot make the foregoing certification, the bidder shall so state and shall furnish with the bid a signed statement which sets forth in detail the reasons thereof. Where (1), (2), and (3) above have not been complied with, the bid shall not be considered for any award nor shall any award be made unless the head of the Purchasing Unit to the political subdivision, public department, agency or official thereof to which the bid is made, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

The fact that a bidder (a) has published price lists, rates, or tariffs covering items being procured, (b) has informed prospective customer of proposed or pending publication of new or revised price lists for such items, or (c) has sold the same items to other customers at the same prices being bid, does not constitute, without more, a disclosure within the meaning of paragraph "A" above.

B. Any bid hereafter made to any political subdivision of the state or any public department, agency or official thereof by a corporate bidder for work or services performed or to be performed or goods sold or to be sold, where competitive bidding is required by statute, rule, regulation, local law, and where such bid contains the certification referred to in paragraph "A" of this section, shall be deemed to have been authorized by the Board of Directors of the bidder, and such authorization shall be deemed to include the submission of the bid and the inclusion therein of the certificate as to non-collusion as the act and deed of the corporation



Signature

CEO

Title

August 4, 2023

Date

StreamLink Software Inc. DBA AmpliFund
Company Name

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ATTACHMENT "B"
ACKNOWLEDGMENT BY PROPOSER

If Individual or Individuals:

STATE OF _____)
COUNTY OF _____) SS.:

On this _____ day of _____, 20____, before me personally appeared _____ to me known and known to me to be the same person(s) described in and who executed the within instrument, and he (or they severally) acknowledged to me that he (or they) executed the same.

Notary Public, State of _____

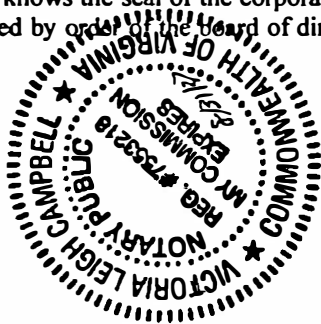
Qualified in _____

Commission Expires _____

If Corporation:

STATE OF Virginia)
COUNTY OF Fauquier) SS.:

On this 8th day of August, 2023, before me personally appeared Scott M. Smith to me known, who, being by me sworn, did say that he resides at (give address) 6803 Tanglewood Dr., Warrenton, VA 20187; that he is the (give title) Chief Executive Officer of the (name of corporation) StreamLink Software Inc. DBA AmpliFund, the corporation described in and which executed the above instrument; that he knows the seal of the corporation, and that the seal affixed to the instrument is such corporate seal; that it was so affixed by order of the Board of directors of the corporation, and that he signed his name thereto by like order.



[Signature]
Notary Public, State of Virginia

Qualified in Fauquier County

Commission Expires 8/31/27

If Partnership:

STATE OF _____)
COUNTY OF _____) SS.:

On the _____ day of _____, 20____, before me personally came _____ to me known to be the individual who executed the foregoing, and who, being duly sworn, did depose and say that he / she is a partner of the firm of _____ and that he / she has the authority to sign the same, and acknowledged that he / she executed the same as the act and deed of said partnership.

Notary Public, State of _____

Qualified in _____

Commission Expires _____

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**ALBANY COUNTY
VENDOR RESPONSIBILITY QUESTIONNAIRE**

FEIN #

State of: Virginia)
) ss:
County of: Fauquier)

CERTIFICATION:

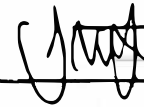
The undersigned recognizes that this questionnaire is submitted for the express purpose of assisting the County of Albany in making a determination regarding an award of contract or approval of a subcontract; acknowledges that the County may in its discretion, by means which it may choose, verify the truth and accuracy of all statements made herein; acknowledges that intentional submission of false or misleading information may constitute a felony under Penal Law Section 210.40 or a misdemeanor under Penal Law Section 210.35 or Section 210.45, and may also be punishable by a fine and/or imprisonment of up to five years under 18 USC Section 1001 and may result in contract termination; and states that the information submitted in this questionnaire and any attached pages is true, accurate and complete.

The undersigned certifies that he/she:

- Has not altered the content of the questions in the questionnaire in any manner;
- Has read and understands all of the items contained in the questionnaire and any pages attached by the submitting vendor;
- Has supplied full and complete responses to each item therein to the best of his/her knowledge, information and belief;
- Is knowledgeable about the submitting vendor's business and operations;
- Understands that Albany County will rely on the information supplied in the questionnaire when entering into a contract with the vendor;
- Is under duty to notify the Albany County Purchasing Division of any material changes to the vendor's responses.

Name of Business StreamLink Software Inc.

Signature of Owner



Address 812 Huron Road East, Suite 550

Printed Name of Signatory

Scott M. Smith

City, State, Zip Cleveland, OH 44115

Title Chief Executive Officer

Subscribed before me this

day of

August, 2023

Notary Public



Victoria Campbell

Printed Name

Signature

Date

8/8/23

**ATTACHMENT “C”
ALBANY COUNTY
VENDOR RESPONSIBILITY QUESTIONNAIRE**

1. VENDOR IS: <input checked="" type="checkbox"/> PRIME CONTRACTOR			
2. VENDOR’S LEGAL BUSINESS NAME StreamLink Software Inc.		3. IDENTIFICATION NUMBERS a) FEIN # 27-1444897 b) DUNS # 04-191-8948	
4. D/B/A – Doing Business As (if applicable) & COUNTY FIELD: AmpliFund		5. WEBSITE ADDRESS (if applicable) www.amplifund.com	
6. ADDRESS OF PRIMARY PLACE OF BUSINESS/EXECUTIVE OFFICE 812 Huron Road, Suite 550 Cleveland, OH, 44115		7. TELEPHONE NUMBER 216.377.5500	8. FAX NUMBER 216.377.5501
9. ADDRESS OF PRIMARY PLACE OF BUSINESS/EXECUTIVE OFFICE <i>IN NEW YORK STATE, if different from above</i> N/A		10. TELEPHONE NUMBER N/A	11. FAX NUMBER N/A
12. AUTHORIZED CONTACT FOR THE QUESTIONNAIRE Name Scott Smith Title CEO Telephone Number 540.326.6686 Fax Number 216.377.5501 e-mail ssmith@amplifund.com			
13. LIST ALL OF THE VENDOR’S PRINCIPAL OWNERS.			
a) NAME	TITLE	b) NAME	TITLE
c) NAME	TITLE	d) NAME	TITLE
A DETAILED EXPLANATION IS REQUIRED FOR EACH QUESTION ANSWERED WITH A “YES,” AND MUST BE PROVIDED AS AN ATTACHMENT TO THE COMPLETED QUESTIONNAIRE. YOU MUST PROVIDE ADEQUATE DETAILS OR DOCUMENTS TO AID THE COUNTY IN MAKING A DETERMINATION OF VENDOR RESPONSIBILITY. PLEASE NUMBER EACH RESPONSE TO MATCH THE QUESTION NUMBER.			
14. DOES THE VENDOR USE, OR HAS IT USED IN THE PAST FIVE (5) YEARS, ANY OTHER BUSINESS NAME, FEIN, or D/B/A OTHER THAN THOSE LISTED IN ITEMS 2-4 ABOVE? List all other business name(s), Federal Employer Identification Number(s) or any D/B/A names and the dates that these names or numbers were/are in use. Explain the relationship to the vendor. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 			
15. ARE THERE ANY INDIVIDUALS NOW SERVING IN A MANAGERIAL OR CONSULTING CAPACITY TO THE VENDOR, INCLUDING PRINCIPAL OWNERS AND OFFICERS, WHO NOW SERVE OR IN THE PAST ONE (1) YEARS HAVE SERVED AS: <div style="display: flex; justify-content: space-between; align-items: flex-end;"> <div style="width: 80%;"> a) An elected or appointed public official or officer? <i>List each individual’s name, business title, the name of the organization and position elected or appointed to, and dates of service</i> </div> <div style="width: 15%; text-align: right;"> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No </div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-end; margin-top: 10px;"> <div style="width: 80%;"> b) An officer of any political party organization in Albany County, whether paid or unpaid? <i>List each individuals name, business title or consulting capacity and the official political position held with applicable service dates.</i> </div> <div style="width: 15%; text-align: right;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </div> </div>			

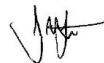
16.	<p>WITHIN THE PAST (5) YEARS, HAS THE VENDOR, ANY INDIVIDUALS SERVING IN MANAGERIAL OR CONSULTING CAPACITY, PRINCIPAL OWNERS, OFFICERS, MAJOR STOCKHOLDER(S) (10% OR MORE OF THE VOTING SHARES FOR PUBLICLY TRADED COMPANIES, 25% OR MORE OF THE SHARES FOR ALL OTHER COMPANIES), AFFILIATE OR ANY PERSON INVOLVED IN THE BIDDING OR CONTRACTING PROCESS:</p> <p>a) 1. been suspended, debarred or terminated by a local, state or federal authority in connection with a contract or contracting process; <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>2. been disqualified for cause as a bidder on any permit, license, concession franchise or lease;</p> <p>3. entered into an agreement to a voluntary exclusion from bidding/contracting;</p> <p>4. had a bid rejected on an Albany County contract for failure to comply with the MacBride Fair Employment Principles;</p> <p>5. had a low bid rejected on a local, state or federal contract for failure to meet statutory affirmative action or M/WBE requirements on a previously held contract;</p> <p>6. had status as a Women's Business Enterprise, Minority Business Enterprise or Disadvantaged Business Enterprise, de-certified, revoked or forfeited;</p> <p>7. been subject to an administrative proceeding or civil action seeking specific performance or restitution in connection with any local, state or federal government contract;</p> <p>8. been denied an award of a local, state or federal government contract, had a contract suspended or had a contract terminated for non-responsibility; or</p> <p>9. had a local, state or federal government contract suspended or terminated for cause prior to the completion of the term of the contract.</p> <p>b) been indicted, convicted, received a judgment against them or a grant of immunity for any business-related conduct constituting a crime under local, state or federal law including but not limited to, fraud extortion, bribery, racketeering, price-fixing, bid collusion or any crime related to truthfulness and/or business conduct? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>c) been issued a citation, notice, violation order, or are pending an administrative hearing or proceeding or determination of violations of: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>1. federal, state or local health laws, rules or regulations.</p>
17.	<p>IN THE PAST THREE (3) YEARS, HAS THE VENDOR OR ITS AFFILIATES H HAD ANY CLAIMS, JUDGMENTS, INJUNCTIONS, LIENS, FINES OR PENALTIES SECURED BY ANY GOVERNMENTAL AGENCY? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Indicate if this is applicable to the submitting vendor or affiliate. State whether the situation(s) was a claim, judgment, injunction, lien or other with an explanation. Provide the name(s) and address(es) of the agency, the amount of the original obligation and outstanding balance. If any of these items are open, unsatisfied, indicate the status of each item as "open" or "unsatisfied."</p>
18.	<p>DURING THE PAST THREE (3) YEARS, HAS THE VENDOR FAILED TO:</p> <p>a) file returns or pay any applicable federal, state or city taxes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>Identify the taxing jurisdiction, type of tax, liability year(s), and tax liability amount the vendor failed to file/pay and the current status of the liability.</i></p> <p>b) file returns or pay New York State unemployment insurance? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>Indicate the years the vendor failed to file/pay the insurance and the current status of the liability.</i></p> <p>c) Property Tax <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>Indicate the years the vendor failed to file.</i></p>
19.	<p>HAVE ANY BANKRUPTCY PROCEEDINGS BEEN INITIATED BY OR AGAINST THE VENDOR OR ITS AFFILIATES I WITHIN THE PAST SEVEN (7) YEARS (WHETHER OR NOT CLOSED) OR IS ANY BANKRUPTCY PROCEEDING PENDING BY OR AGAINST THE VENDOR OR ITS AFFILIATES REGARDLESS OF THE DATE OF FILING? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>Indicate if this is applicable to the submitting vendor or affiliate. If it is an affiliate, include the affiliate's name and FEIN. Provide the court name, address and docket number. Indicate if the proceedings have been initiated, remain pending or have been closed. If closed, provide the date closed.</p>
20.	<p>IS THE VENDOR CURRENTLY INSOLVENT, OR DOES VENDOR CURRENTLY HAVE REASON TO BELIEVE THAT AN INVOLUNTARY BANKRUPTCY PROCEEDING MAY BE BROUGHT AGAINST IT? Provide financial information to support the vendor's current position, for example, Current Ration, Debt Ration, Age of Accounts Payable, Cash Flow and any documents that will provide the agency with an understanding of the vendor's situation. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>

21.	IN THE PAST FIVE (5) YEARS, HAS THE VENDOR OR ANY AFFILIATES ¹ :	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	a) defaulted or been terminated on, or had its surety called upon to complete, any contract (public or private) awarded;		
Indicate if this is applicable to the submitting vendor or affiliate. Detail the situation(s) that gave rise to the negative action, any corrective action taken by the vendor and the name of the contracting agency.			

1 “Affiliate” meaning: (a) any entity in which the vendor owns more than 50% of the voting stock; (b) any individual, entity or group of principal owners or officers who own more than 50% of the voting stock of the vendor; or (c) any entity whose voting stock is more than 50% owned by the same individual, entity or group described in clause (b). In addition, if a vendor owns less than 50% of the voting stock of another entity, but directs or has the right to direct such entity’s daily operations, that entity will be an “affiliate” for purposes of this questionnaire.

Attachment "D"
Certification Pursuant to Section 103-g
Of the New York State
General Municipal Law

- A. By submission of this bid/proposal, each bidder/proposer and each person signing on behalf of any bidder/proposer certifies, and in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each bidder is not on the list created pursuant to paragraph (b) of subdivision 3 of Section 165-a of the New York State Finance Law.
- B. A Bid/Proposal shall not be considered for award, nor shall any award be made where the condition set forth in Paragraph A above has not been complied with; provided, however, that in any case the bidder/proposer cannot make the foregoing certification set forth in Paragraph A above, the bidder/proposer shall so state and shall furnish with the bid a signed statement which sets forth in detail the reasons therefor. Where Paragraph A above cannot be complied with, the Purchasing Unit to the political subdivision, public department, agency or official thereof to which the bid/proposal is made, or his designee, may award a bid/proposal, on a case by case business under the following circumstances:
1. The investment activities in Iran were made before April 12, 2012, the investment activities in Iran have not been expanded or renewed after April 12, 2012, and the Bidder/Proposer has adopted, publicized and is implementing a formal plan to cease the investment activities in Iran and to refrain from engaging in any new investments in Iran; or
 2. The political subdivision makes a determination that the goods or services are necessary for the political subdivision to perform its functions and that, absent such an exemption, the political subdivision would be unable to obtain the goods or services for which the contract is offered. Such determination shall be made in writing and shall be a public document.



Signature

CEO
Title

August 4, 2023
Date

StreamLink Software Inc. DBA AmpliFund
Company Name