

**BALTIMORE COUNTY, MARYLAND
PURCHASING DIVISION
400 WASHINGTON AVENUE, ROOM 148
TOWSON, MARYLAND 21204-4665**



REQUEST FOR INFORMATION NO. I-10000299

**GRANTS MANAGEMENT SOFTWARE FOR THE DEPARTMENT OF
HOUSING AND COMMUNITY DEVELOPMENT**

Due Date: 10/18/2024 Time: 3:00 PM

EMAIL INFORMATION TO: bid@baltimorecountymd.gov

**Jason Hartline, Senior Buyer
PHONE: 410-887-2495
EMAIL: jhartline@baltimorecountymd.gov**

Amendments often occur prior to the opening and sometimes within as little as 48 hours prior to due date. It is the potential Solution Provider's responsibility to frequently visit the Purchasing web site (<https://www.baltimorecountymd.gov/departments/budfin/purchasing/>) to obtain amendments once they have downloaded this Request for Information.

**BALTIMORE COUNTY, MARYLAND
REQUEST FOR INFORMATION NO. I-10000299
GRANTS MANAGEMENT SOFTWARE FOR THE DEPARTMENT OF HOUSING AND COMMUNITY
DEVELOPMENT**

TABLE OF CONTENTS

1. Statement of Purpose
2. Background
3. Vendor Solutions
4. Instructions for Responding
5. Inquiries
6. Questionnaire

**BALTIMORE COUNTY, MARYLAND
REQUEST FOR INFORMATION NO. I-10000299
GRANTS MANAGEMENT SOFTWARE FOR THE DEPARTMENT OF HOUSING AND
COMMUNITY DEVELOPMENT**

1. STATEMENT OF PURPOSE.

- 1.1 The purpose of this Request for Information (RFI) is to obtain information from the vendor community on the availability, capability, and functionality of Grants Management Software solutions currently offered in the marketplace. This system will be used by the Department of Housing and Community Development (DHCD) and potentially as an enterprise solution for Baltimore County, Maryland (County Government).

The desired outcome for this RFI is to obtain information from the vendor community on the availability, capability, and functionality for a single software solution that will provide a centralized access approved portal for a Baltimore County agency applying for and receiving grant funds, awarding grants and individual/organization applying for a grant. The proposed software application will include the ability to create individual user profiles, upload, export, receive required documents between the agency and grantee, and ability to schedule alert notifications that action items are due or have been received. It is crucial to prioritize data security and compliance with relevant laws and regulations, and protection of Personal Identifiable Information (PII).

The RFI is issued solely for information and planning purposes only and should not be construed as a solicitation, nor should it be construed as an obligation on the part of the County to make any purchases.

This RFI should not be construed as a means to pre-qualify vendors. It does not constitute a Request for Proposal (RFP) or a promise to issue an RFP in the future.

This is not a formal solicitation, but a request for interested parties to provide information as specified herein.

Participation in this RFI is voluntary.

Baltimore County Government (“BCG”) appreciates your input in this process.

No purchases will be made as a result of this request. Any price information provided shall be used for:

- 1.2 **The specific objectives that the County intends to accomplish through this RFI are as follows:**

1.2.1 Identify Solution Providers who offer Grants Management Software.

- 1.2.2 Identify Solution Providers who have experience providing Grants Management Software solutions for County/State/Federal governments.
- 1.2.3 Identify what standard integration architectures are supported by Solution Provider's modules.
- 1.2.4 Determine the ability and ease to create interfaces from the Grants Software solutions systems to other applications used by the County.
- 1.2.5 Identify other government entities which have recently implemented similar systems and learn from their experiences.
- 1.2.6 Identify Solution Providers who offers technical support by either phone, email, online chat, etc. Also identify a vendor who provides technical support 24 hour per day or at least on weekdays during Baltimore County Government's core business hours.
- 1.2.7 Identify Solution Providers who offer a Grants Management Software solution with (but not limited to) the capabilities outlined in 3.1.

2. **BACKGROUND.**

The existing Baltimore County Grants Management process is a manual process lacking interfacing capabilities across systems. County agencies currently use a standard Request for Financial Assistance form that is located on the Baltimore County Government Grants Management page. All additional application supplemental documents and materials submissions specific to individual grant programs are handled manually.

Baltimore County agencies are currently facing several challenges with the management of grants programs. The County is open to any and all solutions from the vendor community. The County is seeking Solution Providers that can meet the BCG's needs., including the following attributes:

- 2.1 **Streamline Grants Management:** Manual email communications, record-keeping and data management processes can lead to errors, delays in processing, added time consumption in tracking original and supplemental materials and documents, notes, and historical data.
- 2.2 **Absence of Applications Interface:** Grants information is processed, received and stored in various but separate locations without linking or updating across systems, e.g., MS Word, MS. Excel, File Share Site.
- 2.3 **Reporting and Analytics:** Baltimore County Agencies do not have software driven reports and statistics for internal, county and public use statistics for internal, county and public use.
- 2.4 **Manual Data Compilation:** Agencies require the ability to perform data queries based on geographical areas, client or household demographics, funds allocated

per household and other grant requirements which would be used to create reports.

3. VENDOR SOLUTIONS.

3.1 The County is open to any and all solutions from the vendor community. The County is seeking Solution Providers that can meet the BCG’s Agency needs, including the following attributes:

3.1.1 Solution Provider shall be regularly and continuously engaged in the business of developing and delivering **Grants Management Software** application for at least five (5) years. Please include in your Response a customer testimonial, performance narrative from past project, published research or a combination of these to demonstrate this qualification.

3.1.2 Solution Provider has demonstrated required knowledge of building integrations with various systems using industry standard data interchange formats/ protocols.

3.1.3 Solution Provider has demonstrated experience within the past five (5) years of successfully scaling up a major project within a short time frame, with the administrative capacity and staff to rapidly train and support diverse users and stakeholder organizations in a feasible, scalable manner.

3.1.4 The product must comply with the County’s Information Technology Technical Standards which are available at:
<https://resources.baltimorecountymd.gov/Documents/IT/technicalstandards.pdf>.

3.1.5 Provides for data and access security that meets the County’s standards which are based on NIST 800-53 for privacy and security.

3.1.6 Is fully compliant with the requirements of any federal, state and county legislation. NOTE: Proposed solutions supporting government mandated programs should be modifiable in a timely manner to accommodate frequent time sensitive legislative changes in Maryland thereby allowing users to remain legislatively compliant.

3.1.7 The implementation of a solution must allow for interface or integration with existing County architecture. BCG utilizes the following software:

Product	Purpose	Integrate/Replace	Used By
Workday	Grant awards disbursement, reporting and financial tracking.	No Action	BCG

Product	Purpose	Integrate/Replace	Used By
Baltimore County Maryland Public Website	Public site that provides the grants web-page.	Integrate	BCG
Homeless Management Information System (HMIS)	Stores client-level information on the types of services needed.	Integrate	BCG
Integrated Disbursement Information System (IDIS)	Ability to export data for completing required reporting.	Integrate	BCG
MS Outlook	Messaging System	Integrate	BCG
Adobe	Fill and Sign Tools	Integrate	BCG
My Neighborhood	GIS Tools for mapping and tracking service areas.	Integrate	BCG

3.1.8 The DHCD requires a solution to provide functionality for the following areas:

3.1.8.1 Grants Management Software

3.1.8.1.1 Individual Grants Management

3.1.8.1.1.1 The ability for the Grant Administrator to submit online grant applications electronic fillable forms to single/homeowner applicant(s), for their projects.

3.1.8.1.1.2 The ability to download and print grant applications for applicants without the capacity to complete online forms.

3.1.8.1.2 Portal for External Applicants, County Agencies and County Departments.

3.1.8.1.2.1 Allow external users to be granted access to a secured user-friendly portal to create a 'Grantee Profile' and have the ability to add organization structure, budget, funders, staff, individual Information.

3.1.8.1.2.2 The ability to submit online grant applications electronic fillable forms for single/homeowner applicant(s) and housing rehabilitation projects.

3.1.8.1.2.3 The ability to allow applicants to select grant types from the grant software solutions portal.

3.1.8.1.2.4 Ability to allow applicants to complete online fillable grant application forms for the various grant programs.

3.1.8.1.2.5 The ability for external users to preview their application before submission and make revisions is needed, including budget revision.

3.1.8.1.2.6 Allow access to the site by multiple County departments (designated log-in).

3.1.8.1.3 Grantee Process Tracking

3.1.8.1.3.1 Ability to track all stages of the applications process.

3.1.8.1.3.2 Ability to assign time stamps to documents sent and received.

3.1.8.1.3.3 Ability to deliver confirmations of receipt to Grant Administrators and Grantees.

3.1.8.1.4 Financial Tracking

3.1.8.1.4.1 Ability to allow adjustments to line items e.g., monthly expenditure reports as needed.

3.1.8.1.4.2 Ability to allow Grant Administrators to manage multiple funding streams, e.g., federal, state, county, and potentially private funding.

3.1.8.1.5 Import, Export and Download Supplemental Materials /Documents/Exhibits

3.1.8.1.5.1 The ability to upload additional required documents and retain previous versions.

3.1.8.1.5 Reporting and Analytics

3.1.8.1.5.1 Ability for the external user to upload project proposals, scope of work, program data, e.g., demographic, performance outcomes, and statistical data.

3.1.8.1.5.2 Geographical, Household and Demographic Data Access.

3.1.8.1.5.3 Ability to track, analyze and report on performance measurement data.

3.1.8.1.6 Dynamic Document Management

3.1.8.1.6.1 Ability to dynamically manage and update forms /documents based on new requirements, rather than creating separate forms/documents for each additional required revision.

3.1.8.1.6.2 Ability to retain document revisions and email communication for auditing and tracking purposes.

3.1.8.1.7 Automated Process Status Alerts

3.1.8.1.7.1 Ability to notify Grant Administrators and external users on action items.

3.1.8.1.7.2 Ability for external users to schedule notification frequency on action items.

3.1.8.1.8 Integration with other Systems

3.1.8.1.8.1 Ability to export data from grantee application into existing County applications.

3.1.8.1.8.2 Describe how the proposed solution securely integrates and syncs with Microsoft Outlook Mail.

3.1.8.1.9 Historical Data Storage

3.1.8.1.9.1 Ability to store historical data for any applicable term in keeping with the required regulations of the funding source.

- 3.1.9 County agencies must manually retrieve applications and supplemental requirements received in department email or File Share; the County's online file system and shared drive folders that are individually created by agency administrators. This can be a time-consuming process which needs to be streamlined. The files from grantees are MS Excel and MS Word which require manual processing and comparative analysis for tracking applications and other related grants information.
- 3.1.10 County agencies rely on manually forwarded application packets for review and processing. Communications regarding receipt of submissions and follow-up requirements are initiated manually. This results in a delay in processing.
- 3.1.11 County agencies face critical challenges in managing resubmission of grant applications. When revised documents are received and processed, the current system requires a manual file transfer to an internal shared site to replace previously submitted documents. An integrated process would aid in tracking an applicant's performance throughout the life of the grant.
- 3.1.12 Agencies cannot cross reference grantee information or awards received to make real-time updates or to flag grantee applications for any purpose.
- 3.1.13 County agencies are in need of an access granted public portal to allow applicants to search and select grant types, download or complete the Request for Financial Assistance and all other applicable application forms. In addition, the ability to upload, review, edit, submit and re-submit additional versions of any and all documents required.
- 3.1.14 The implementation of the proposed Grants Management Software solution must align with the goals and strategic initiatives of the County. Specifically, the proposed solution must contribute to the effective communication with internal and external stakeholders; streamline interaction management and create efficiencies throughout the organization, track and report on interactions and outcomes.

4. INSTRUCTIONS FOR RESPONDING.

- 4.1 Solution Providers responding to this RFI are required to submit their information by **October 18, 2024 at 3:00pm to bid@baltimorecountymd.gov**. Late responses will not be considered.
- 4.2 Solution providers are advised that the County cannot receive email attachments greater in size than twenty-five (25) megabytes and this size limitation may be further reduced by requirements of the Solution Providers' email provider which are beyond the control of the County. Solution Provider should consider separating any large attachment into multiple parts and emailing each part separately. In

such case, Solution Provider will note that each email is *1 of 2, 2 of 2, etc.*

- 4.3 As with any system, power outages or technology problems may arise that are outside of the County's control and could affect your submission. The County will not be held accountable for such issues that may delay the transmission of any Solution.
- 4.4 To support the review activities, the County is requiring a consistent format for all responses. As such, the following Questionnaire should be used when responding to this RFI. The Questionnaire includes items regarding solution provider information, software functionality, technology information, and general questions. Additional information such as marketing brochures, product fact sheets, technical documentation, etc. may also be provided.
- 4.5 Solution Provider will possess all permits, licenses and professional credentials necessary to supply product and perform services as specified under this RFI.

5. **INQUIRIES.**

- 5.1 All correspondence / questions related to this RFI must be directed to the Buyer, Jason Hartline via email jhartline@baltimorecountymd.gov
- 5.2 Any inquiries, suggestions or requests concerning interpretation, clarification or additional information pertaining to this RFI will be provided by written addendum and posted on <http://www.baltimorecountymd.gov/Agencies/budfin/purchasing/currentsolicitations.html>.
- 5.3 The deadline for written questions are 7 working days prior to the due date.

6. **QUESTIONNAIRE.**

Responses to this RFI should address each item within this questionnaire. Please respond to each question as completely and succinctly as possible.

A. **VENDOR INFORMATION: This information MUST be the first page of your submittal.**

1. Company Name
2. Parent Company
3. Mailing Address
4. Contact Name, Telephone, and Email Address
5. Year founded

6. Company Website URL
7. Main products/services provided
8. Software name (market name)
9. Number of years on the market
10. Number of clients by type (i.e., county, municipality, etc.) using any of your proposed solutions

NOTE: All answers should be preceded by the corresponding question.

B. GENERAL INFORMATION.

1. Product Names and Descriptions – Please describe your solution, and clearly identify the individual software modules, add-ons, e.g., utilities/tools/report generators, underlying technology, and third-party applications that you would recommend that meet the County's requirements.
2. What is the proposed solution? How long has the proposed version of the solution been available for client use? How long do you expect this version to be a viable release? When was the last time that the user interface updated/refreshed?
3. Describe the history of the primary product(s) being proposed including whether these product(s) were internally developed, acquired in-whole or in part, or something different.
4. Please provide the upgrade or release plans for the next three years. Include in your response the extent to which the proposed product(s) are to be replaced or substantially modified. How often are major upgrades for the proposed solution released? Minor upgrades?
5. Describe what methods your company uses to keep pace with changes in your target industry.
6. How many clients and sites are currently using the proposed version as their production system? Provide a list of state and county agencies in which your products are in use. What is the largest organization you support? Please describe this organization and the setup/use of your system in this environment.
7. Describe the process in which state statutes, county ordinance, and other regulatory requirements are incorporated into your solution.

8. How many clients and sites are currently using the proposed version as their grants management system? Provide a list of states/counties systems in which your products are in use. What is the largest organization you support? Please describe this organization and the setup/use of your system in this environment.

C. BUSINESS SPECIFIC INFORMATION – Grants Management Software Solutions

Describe how your solution can provide the following:

1. Provide representative screenshots of the business user and applicant user interface.
2. Describe how the proposed solution allows the business user to provide access credentials with a designated login to the applicant user and business users outside of the agency.
3. Describe how the proposed solution allows the user to manage and track progress status of each grant.
4. Describe how the proposed solution allow the user to securely enter confidential information into a user portal, e.g., grantee profile, organization information structure, budget, funders, staff, PII, etc.
5. Describe how the proposed solution allows the user to complete online grant applications fillable/interactive/Adobe forms for project description, project budget, uploading additional documents.
6. Describe how the proposed solution allows business users to receive and share grant requirements from funders/grantors (guidelines, FAQ, etc.).
7. Describe how the proposed solution allows the business user to refer documents across departments for review and approval processing.
8. Also, describe how the proposed solution allows business users to track such documents and outcomes.
9. Describe how the proposed solution allows business users to manage budgeting, allowing adjustments to line items (expenditures).
10. Describe how the proposed solution allows business users to perform monthly, quarterly and annual reporting and the transfer of reporting documents to external grantors and grantees.
11. Describe how the proposed solution allows business users to allow reporting and performance measurements to be entered online and analyzed.

12. Describe how the proposed solution allows business users to manage multiple funding streams, multiple federal grant sources, state grants, County funding, and private funding.
13. Describe how the proposed solution sends notifications to the business user that an applicant user has submitted documents.
14. Also, describe how the applicant user will be able to schedule notification alerts of requests for requirements information, confirmation of receipt of delivered information on staff member who has been assigned to a ticket.
15. Describe how the proposed solution allows business users to search for and filter grantees by grant type, etc.
16. Describe how the proposed solution allow external business partners to have portal access to accommodate collaboration of grants processing.
17. Does proposed solution allow business users to add or select custom fields on grant application forms based on grant types? If so, please describe.

Contacts Management:

18. Provide representative screenshots of the Contacts Management user interface.
19. Provide a list of Contact Management features and detailed description of the capabilities for how this proposed solution captures and manages grantees' contact data and related notes.
20. Describe how the proposed solution allows business users to categorize contacts by group (i.e., grant type, award year, award amount, etc.).
21. Describe how the proposed solution allows business users to relate and track current, past, and future grantee and awards information.
22. Describe how the proposed solution allows the business user to search for and filter grant types.
23. Describe the proposed solution's sharing and collaboration capabilities where grantee applicants' contact data and related activities can be private or securely shared within a Council District team, across Council District team, or specific staff personnel.
24. Does proposed solution allow business users to add custom fields for contacts? If so, please describe.

Calendar Management:

25. Provide a list of Calendar features and capabilities, along with detailed descriptions of each.
26. Provide representative screenshots of the Calendar user interface.
27. Describe how the proposed solution allows the business user to add and manage activities on the Calendar user interface.
28. Describe how the proposed solution adds and manages related contacts to activities within the Calendar feature.
29. Describe how the proposed solution securely integrates and syncs with Microsoft Outlook Calendar.
30. Describe how the proposed solution allows Calendar views to be securely shared within the Council District team and other required agency staff and OIT required Administration.
31. Is the Calendar of the proposed solution configurable and customizable? If so, please describe.

Pipeline Management:

32. Provide a list of Pipeline workflows and capabilities, along with detailed descriptions of each.
33. Describe how the proposed solution will enable business users to track all tickets and activities related to a grantee.
34. Describe how the proposed solution allow for multiple business users' input and manage data (i.e., contacts, tasks, calendar entries, etc.) as well as run reports and perform other capabilities simultaneously.
35. Does the data input sync continually in real-time?

Marketing Automation Management:

36. Provide a list of Marketing Automation features and capabilities, along with detailed descriptions of each.
37. Describe how the proposed solution provides the ability to design and launch email campaigns to send to grantee group types (i.e., specific grant type notices, etc.)

Dashboard Visualization and Analytics:

38. Provide a list of visualization and analytics features and capabilities, along with detailed descriptions of each.

39. Provide representative screenshots of the visualization dashboard on the user interface.
40. Describe how the proposed solution visually displays an analytic view of activity statuses and associated grants and/or grantees to track at a glance.

Reporting:

41. Provide a list of Reporting features and capabilities the proposed solution offers, along with detailed descriptions of each.
42. If canned reports can be delivered with the proposed solution that are editable reports without vendor assistance.
43. Describe how the proposed solution generates canned reports.
44. Describe how the proposed solution can allow Admin staff to customize reports.
45. Describe how the proposed solution handles a secure export and download of reports and the file export formats used.

Mobile App:

46. Describe the ability to access the proposed solution remotely via mobile devices and protocols. Also, does the solution provide for synchronization when offline?

D. TECHNICAL INFORMATION

***Please mark any questions that are not applicable to your solution as “not applicable”.**

Software/Licensing

1. Provide the current hardware/software environment for the solution, including operating system, database, etc.
2. Describe what versions and internet browsers the system supports. Include which mobile devices the system supports. Describe your approach for keeping up with the latest browsers and mobile devices.
3. What is the solution’s conformance to ADA standards related to web interfaces?

4. Identify out-of-the-box tools provided to build interfaces with other business systems. Include in your response required and/or recommended third party integration tools.
5. The County intends that the solution will be installed on multiple environments (such as test, development, training, production, and any others.) Identify any concerns of Offeror regarding this. Describe whether there is an additional licensing cost to provision and maintain multiple non-production environments.
6. Identify and describe any concerns with copying the proposed solution from one environment to another (such as copying from production to development, test, training, etc.) in a virtualized environment or any other environment.
7. Describe your company's testing and quality control process.
8. Describe the processes used to export, import, and upload data. Include in your response the formats that can be imported/exported, and a description of how vendor interfaces are developed and maintained.
9. Describe how data is shared across modules. Include in your response how data produced from the proposed solution is fully integrated throughout all major areas of the solution. In your response indicate what type of data is available real-time versus copied through interfaces or batch processes.
10. Does the proposed solution maintain a full history of interactions/transactions including the ability to enter ad-hoc notes and recording the results of interactions?
11. If a data warehouse is used for reporting, describe the process and frequency by which the data is refreshed. What type of system assurance reports are available to compare the source and target databases?

Third-Party Integrations

12. Provide a list and description of third-party applications and platforms the proposed solution is compatible with for integration.

Data Migration

13. Describe how the proposed solution supports the migration of data currently captured and managed in a different source repository.

Reporting

14. Does the proposed solution support real-time reporting? If so, what impact, if any, does it have on system performance?

15. Describe reporting functionality available for querying system access, metrics, or performance.
16. Describe how the proposed solution supports generating reports based on weekly, monthly and daily data during a specified date range. This includes detailed reports of all activity by user on a given day by a transaction type and/or entity. The proposed solution must also support the ability to perform complex calculations and logic inside of reports.

Security

17. Describe application security (including but not limited to role, user, screen, module, table, column, update, view-only, field). If the proposed solution supports role-based privileges, describe how roles are maintained and administered by designated security administrators.
18. Describe any automatic functions, such as inactivity log-off, used in the solution.
19. Explain how the system can allow password reset by selected users without giving access to administrator functions.
20. Does the proposed solution support “single sign-on” through Microsoft Active Directory’s LDAP implementation? Explain the authentication method employed and ability to integrate with AD or LDAP.
21. Identify any sensitive data that the solution uses for identification and whether or not this data is encrypted at rest and in transit.
22. Describe policies with regard to criminal background checks for staff assigned to work on any portion of the contract, including third party vendors.
23. Do you have a formal incident response plan? If yes, please describe your plan and attach documentation where possible.
24. Are passwords hashed and salted (SHA-1, SHA-256, MD-5, etc.) so that they cannot be decrypted? Please describe.
25. What protections do you have in place for ensuring only authorized employees have access to County data?
26. Does your company own the physical data center where the County's data will reside? If yes, describe how your facility is physically secure. If no, who owns the data center and what security is in place?

27. If you are using a co-located data center, will any of the County's data ever leave the continental United States? If so, please list all countries where it will be stored.
28. Are intrusion detection and technologies and firewalls utilized on the hosted systems? Please describe.
29. Will County data be shared with or hosted by any third parties? If yes, please list all third parties, whether or not you perform security assessments of them, and how often they are reassessed.
30. Have you experienced a security breach? Please provide the detailed procedure to be followed in the event of a data breach with respect to those whose data was breached, including:
 - 30.1 Requirement to notify
 - 30.2 Notification timeframe
 - 30.3 Provision of pertinent breach details
 - 30.4 Circumstances surrounding the breach
 - 30.5 Corrective actions
 - 30.6 Prevention plans
31. Are your systems AND applications scanned for vulnerabilities by a qualified third party? If yes, what scanning companies do you use? How often do you perform a scan? Are your applications scanned prior to a new release?
32. Do you have a disaster recovery plan? If yes, when was the last time you tested your DR plan? How often do you test the plan (schedule)?
33. Describe any policy in place which mandates employees notify them of any criminal charges or offenses.

Hardware, Network, and Database

34. Provide the minimum and recommended requirements for any required application server(s) for the proposed solution. Specify Windows OS/NOS, service levels/packs required (Windows 2019 minimum, preference is Windows 2022), additional software, additional hardware, 32/64 bit, etc.
35. What are the system requirements for this solution to run in a virtual environment (VMware)?

36. Identify the browsers (including versions and service packs) with which the proposed solution has been tested.
37. Provide the minimum and recommended requirements for the database server (SQL 2019 minimum), for the proposed solution. Specify OS/NOS, service levels/packs required, and any additional software and hardware.
38. Define the environment on which the proposed solution runs (two-tier client server, three or n-tier client server, Web browser-based environment, etc.).
39. Does the solution work through proxy servers? Indicate the type of proxy servers that have been tested with the proposed solution.

Project Methodologies and Management

40. Describe in detail your company's methodologies with regard to the following:
 - 40.1 Application development
 - 40.2 Quality control – including types of tests, test plans, assurances that patches are correct, whether unit tests are included within the code, etc.
 - 40.3 Configuration management – including customization management
 - 40.4 Version control
 - 40.5 Describe in detail your company's methodologies with regard to the following:
 - 40.6 Solution upgrades
 - 40.7 Customizations – whether they become part of the base solution, if they are available to all clients paying for support
41. Describe in detail your company's methodologies with regard to the following:
 - 41.1 Project management best practices in the performance of all obligations and responsibilities, particularly those prescribed by the Project Management Institute and documented in the Project Management Book of Knowledge, 3rd edition or later.
 - 41.2 Project management methodology. Provide a detailed overview of the methods for managing communications, scope, cost, time, project and product quality, change, risk, schedule, resource,

- education, plan acceptance, subcontractors and the overall customer relationship.
- 41.3 Project lifecycle (PMLC) and software development lifecycle (SDLC) methodologies, including planning, requirements, design, development/construct, test, training, implementation and evaluation. Identify the development framework to include Waterfall, Agile or Hybrid.
 - 41.4 Project management approach and describe its PMLC and SDLC for the implementation of the system, including the timing of deliveries, training, data conversion and expected effort from County. Include tasks to be performed by County.
 - 41.5 Project schedule showing a typical implementation for the system including significant tasks with milestones and critical path.
 - 41.6 Proposed project status meetings. Describe delivery of weekly meetings, agendas and meeting minutes.
 - 41.7 Escalation process. Describe steps to include task to be performed by County.

Software Business Solutions

- 42. Describe options for Software as a Service (SaaS) or hosted option. Include in your response the number of clients using this option and server locations.
- 43. Describe your communication plan for planned and unplanned downtime.
- 44. Provide a description of Support Agreements (including severity levels and response times).
- 45. Describe your project, implementation, testing, and change management approach. Include in your response whether you use a standardized implementation model.
- 46. Describe your approach and facilities for customer service. What are the locations of your call centers?
- 47. Describe the new release / future release process.
- 48. Describe your issue resolution processes and how you track support. What tracking systems do you use?
- 49. Describe the process used to deliver and install software patches for system defects, including the level of automation of regression testing tools used in

releases, emergency fixes, solution impact notification and version control process, etc.

- 50. Describe the process used to deliver and install software changes needed for regulatory compliance.
- 51. Describe any national and or regional user groups available to County staff.
- 52. The County requires that vendors place application software source code in escrow. Please indicate whether you currently have a master escrow agreement in place and if so, the name of the company and the cost per year.

Training

- 53. Describe all training activities that will be provided to the County. Include what training comes as part of your services and methodology? What type of training do you offer for configuration and customization of software and APIs? Describe system administration training. Describe who does your training. Include any hardware or software used.
- 54. Describe any end user training or focus group services provided. Offeror to include information on access to training systems/instances and relevant data and technology as applicable.

Technical Support

- 55. Describe in detail all levels of technical support that will be provided to the County. Include support hours provide, all contact methods, expected response time, expected resolution time, etc.

E. OTHER INFORMATION. - Please provide any additional information that you feel would be beneficial to the County in researching possibilities when considering solutions.

Please submit this completed Questionnaire with any addition information you choose to share by the closing date and time to bid@baltimorecountymd.gov. Late responses will not be considered. **Thank you!**

COMPANY NAME: _____ DATE _____

CONTACT: _____

PRINT NAME: _____ TITLE: _____

TELEPHONE: _____ EMAIL: _____