

Online Grant Management: Sole Source Justification

While there are many vendors providing online grant management systems, **ZoomGrants provides the optimal solution** to local governments that manage pass-through funding from the U.S. Department of Housing and Urban Development (HUD) Community Planning and Development (CPD) Programs (CDBG, HOME, HOPWA, ESG, COC, etc.).

“ZoomGrants is the only service I’ve found that is built for the public sector by people who have worked in the public sector.”

*S. Bontrager, Housing Program Manager
City of Elk Grove, CA*

Since ZoomGrants’ inception in 2002, we have worked closely with many governments across the country and have experienced a variety of procurement processes. While we understand the need to follow proper bidding and quote procedures, **ZoomGrants is easily justifiable as a Sole Source for online federal grant management services**. Because we would love to help simplify your procurement process, we developed this document, which answers the most important question to ask when considering a Sole Source vendor, to provide significant justification for Sole Source use of ZoomGrants as an online grant management solution provider. We’ve also created a template from which you can copy and paste content as you build your own justification materials to present to the decision-making body in your organization.

Q: Why and in what ways is ZoomGrants the only vendor that can provide this particular service?

A: ZoomGrants has provided technology to and been a trusted advisor for HUD CPD Entitlement Communities across the country since 2008.

A: ZoomGrants was originally designed to increase efficiency and efficacy in HUD CPD Entitlement Communities and Urban Counties and has been constantly improved ever since.

- ∞ The technology and user interface developed by ZoomGrants offers unique tools targeted directly to program managers who administer HUD CPD funding.
- ∞ Our uniquely optimized reporting and post-funding management tools (i.e. checklists, tasks, monitoring, site visit tools, etc.) can be customized with HUD specific language to streamline connectivity and data entry into the IDIS system and increase the ease of overall program management and administration.
- ∞ Our technology connects users with a library of HUD CPD focused application content and reporting resources as well as contacts from other HUD CPD Entitlements utilizing the ZoomGrants system.

A: ZoomGrants is the only online federal grant management vendor with HUD-CPD-Entitlement-trained staff.

A: ZoomGrants is the only vendor of its kind to belong and/or participate with several of the most influential community development associations in the United States:

- ∞ National Community Development Association (NCDA) www.ncda-online.org
- ∞ National County Community and Economic Development Association (NACCED) www.nacced.org
- ∞ Council of State Community Development Agencies <http://www.coscda.org/>
- ∞ Ohio Conference of Community Development (OCCD) <https://www.occd.org/>
- ∞ Florida Community Development Association (FCDA) <http://www.fcda-online.org/>
- ∞ Northwest Association of Community Development Managers (NWACDM) <http://nwacdm.org/>

ZOOMGRANTS

SINCE
2002



County of Hidalgo, TX

Diana R. Serna, Executive Director

Urban County Program

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Alamo, TX 78516

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Proposal by:

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Sales and Customer Relations Manager

(866) 323-5404 ext. 4

January 25, 2018

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Proposed Solution

A Comprehensive HUD CPD focused Online Grant Application Management System

We offer a robust, personalizable, and fully customizable system that can help the **County of Hildago** put its grant programs online. Our system includes the following powerful features:

- Pre-Application – Pre-qualify potential applicants
- Custom Content – Your diverse question types, unique character limits, etc.
- Budgets – Simple or complex budgets, including calculated columns
- Document Attachments – Unlimited number of pertinent documents, photos, and other files
- Decision Tools – Trial balance, scoring reports, comments, private notes, and more
- Custom Reports – Pull data from specific fields to generate ad hoc reports
- Post-Funding Features – Manage Reporting, Invoices, Payments, and Automatic Reminders
- Activity and Audit Logs – Track actions by all users at the program and application levels

The screenshot displays the ZoomGrants software interface. At the top, it identifies the user as 'The Generous Foundation Community Development Department' for the '2015 CDBG - Community Development - Public Services' program, with a total available amount of \$1,020,155.00 and a deadline of 12/31/2020. The main dashboard is divided into several sections:

- Applications:** Shows 10 updated, 2 declined, 8 incomplete/not submitted, and 12 total submitted.
- Pre-Application/Eligibility:** Shows 14 accepted, 14 declined, and 4 not submitted.
- Activity Stream:** A chronological log of user actions, such as 'Preapp Undecided' and 'Report 1 submitted'.
- Contract Stage:** A list of stages from 'Not Assigned' to 'Final Report Submitted'.
- Saved Reports:** Includes Project Summary Report, Nonprofit Verification, Agency Background #2, and Favorite Report.
- Invoices and Payments:** Summary tables showing total deposits, paid amounts, current balances, and approved balances.

 A map of Washington, DC is also visible on the right side of the dashboard.

All those components, plus:

- Batch Emails
- Data Export to .CSV
- Automatic Email Notifications

And, best of all, the ZoomGrants™ auto-save feature.

What Makes Us Good

ZoomGrants™ provides an online platform that can **simplify** and **expedite** the entire grant process, allowing staff to **do more with less** and focus on the application *content* rather than the process.

What Makes Us Better

The ZoomGrants™ system is **more intuitive, more user-friendly, and more powerful** than other grant management systems. We continue perfecting our system with the help of user feedback and team brainstorming sessions where we design and develop new features.

What Makes Us the Best

With ZoomGrants™, users get more than a top-of-the-line application management system, because **we become a critical part of our clients' teams, helping them harness our system to best meet their needs.** With ZoomGrants™, users get a great system *and* **free access to our knowledgeable team of helpful consultants.**

Price Estimate

ZoomGrants™ Pro Subscription <i>(paid annually)</i>	Price Per Year \$2,500	Year(s) 1	\$2,500
Per-Program Fee	Price per Program \$2,000	Estimated Program(s) per Year 4 (CDBG, HOME, ESG, Rehab)	\$8,000
Post Funding Program Fee	\$1,750	1 (2013-2017)	\$1,750
Account Activation <i>(one time only)</i>			\$500
*The total price quoted is for the duration of the contract. Appropriate payments will be made annually, and applicable taxes and fees will be included, where required by law.			TOTAL \$12,750

Our Pricing includes...

- UNLIMITED Applications received
- UNLIMITED User accounts
- UNLIMITED Technical support

Plus, with ZoomGrants™, there's...

- NO Software to install
- NO Servers to maintain
- NO Hidden fees

Visit the ZoomGrants™ Savings Calculator - <https://zoomgrants.com/pricing.asp> – to calculate your financial and environmental savings when you switch from a paper-based system to the ZoomGrants™ cloud-based application system.

Optional Add-Ons:

On-Site Training	A ZoomGrants™ expert conducts training(s) for users at a location determined by the county. Training(s) are customized to best fit the needs of Hidalgo and are based on attendees' technological literacy, experience, etc. as well as the goals of the county.	\$1,000/day
Data Entry	A ZoomGrants™ specialist works directly with county staff to build a new application or enter or adjust an existing one.	\$110/hour
Data Manipulation outside of ZoomGrants™	A ZoomGrants™ specialist exports data out of the system and manipulates it in external software such as Excel, Word, etc. to generate additional report(s) for an Administrative user.	\$110/hour

ZoomGrants™ Comes Highly Recommended

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We specialize in happy customers.

Time and again, we hear from users who rave about the **simplicity, elegance, and versatility** of the ZoomGrants™ system.

They love how easy it is to use.

- “ZoomGrants is by far **the easiest grant submission system** that I have seen. Even someone with no experience in grant submissions can do this.”
- “**ZoomGrants makes applying for grants a simple, painless procedure...**and as a grantwriter, I know how painful the process can be at times. Thank you ZoomGrants!”
- “ZoomGrants has been the **best experience I've had applying** for a grant online.”

They love the helpful features.

- "ZoomGrants **maximizes a candidate's effectiveness** to express their qualifications while **minimizing any fears of technological blunder.**"
- “ZoomGrants eliminates the need to spend hours on logistical details, allowing you to fully **focus on putting together the best grant application possible!**”

They especially love the technical support.

- “The technical support was **fantastic!!**“
- “The technical support received and **the friendly, approachable tech staff took out the fear** of stepping into the future of grant writing.”
- "**Superb tech support**, always available, made completing the application far more simple than it would have if I had been entirely on my own."
- “Technical problems are rare, but **support is always available and responsive.** I highly recommend it.”
- “Probably the best thing about it, for me, was that the technical help that supports the system IS available, usually very quickly, and the person **will keep helping you until you understand what you should do** and you get it right.”

Frequently Asked Questions

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Q: How long does it take to get up and running?

A: We've helped users sign up and go live with their programs in the same day. Our staff can introduce administrative users to the ZoomGrants™ system as well as help put a pre-existing application into the system or consult as a new application is developed.

Q: We're ready to move forward with ZoomGrants™. What's next?

A: Go to <https://ZoomGrants.com> and click Sign Up Now to create an administrative account. Our staff would also be happy to help set up the account. Then, if you're the do-it-yourself type, after you've created your account, you can explore and get acquainted with the system. If you're a read-the-manual-first type, we have a set of **Getting Started videos** to watch before you dive in.

Q: What if we need help?

A: Call (866) 323-5404 x2 or email Questions@ZoomGrants.com. The **ZoomGrants™ Support team** loves providing prompt assistance to all users. Because the system is so intuitive, however, we don't hear from many of our users – we average only three Support inquiries per workday, and about 90% of the inquiries can be addressed in five minutes or fewer.

Q: What about the data that we already have?

A: We can help you migrate your data into the ZoomGrants™ system. Our **Applicant History** section provides an overview of each Applicant's submittal history. Pre-ZoomGrants™ history can even be uploaded into that section, too.

Q: What would happen if we discontinued our use of ZoomGrants™?

A: Your data is always your data. If you choose to stop using ZoomGrants™, we can help export your data, or you can continue your subscription indefinitely to maintain your access to both your data and ZoomGrants™' administrative tools.

Helpful Links

Click on the links below for more information. These slideshows and videos are also available on our website.

System Overview:

- Video <http://youtu.be/fUIkbQjZwCM>
- Slideshow <https://www.zoomgrants.com/welcome/overview.pdf>

User Experiences:

Applicants

- Video <http://youtu.be/4vKgUEcl6eA>
- Slideshow <https://www.zoomgrants.com/welcome/applicantslideshow.pdf>

Reviewers

- Video <http://youtu.be/mz5jdOTNh2g>
- Slideshow <https://www.zoomgrants.com/welcome/ReviewerSlideshow.pdf>

Administrators

- Slideshow <https://www.zoomgrants.com/welcome/adminslideshow.pdf>

“Getting Started” Guide for New Administrative Users:

- Video <http://youtu.be/EaGksbJEtc>

Technical Specifications

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ZoomGrants™ requires only one thing: a browser with an Internet connection.

You and your users can access your programs ...

24 x 7 x 365 from **ANYWHERE** at **ANY** time using **ANY** Internet browser on **ANY** operating system

Installing ZoomGrants™ requires only one line of HTML to be embedded on your website. No software will be installed on your servers.

Security/Availability:

ZoomGrants™ has security measures that ensure the protection and availability of your data, including:

- **Requiring all users to log in with their own user ID and password**, giving them access only to the information that they are authorized to access. Once logged in, they are automatically logged out after a period of inactivity.
- **Providing the option to encrypt your pages and data transfers** using our Secure Socket Layer (SSL) certificate. While this will encrypt data transfers for you and your users, it would require that the pages on your website also be encrypted.

The datacenter that houses everything also has significant security and redundancy features, such as:

- Multiple SAS 70 Type II Certified data centers
- Parallel, redundant, multi-tiered network architecture
- Multiple Tier 1 telecom providers and direct Internet connections
- Complete redundancy in supplying data center power to servers and HVAC
- 24x7x365 redundant monitoring from multiple locations
- State-of-the-art network monitoring software
- Distributed Denial of Service (DDoS) attack response
- Secured physical entrances/exits
- Nightly security updates

This proposal is valid until June 30, 2018 at 5:00pm Mountain Time. To accept the Proposed Solution and Price Estimate as described herein, please sign and write the date in the spaces below and return the signed copy to ZoomGrants™.

Prices for additional years (up to three years total) can be locked in at these price levels by indicating the appropriate duration in the Proposal Acceptance portion, below.

Note that additional grant programs administered by the County of Hidalgo that begin and end in the next 12 months can be added according to the price table presented on page two of this proposal, with no additional activation or subscription fees.

Please also note that ZoomGrants™ shall not be responsible for any software, hardware, or information technology not provided or maintained by ZoomGrants™.

We would be happy to answer questions or hear your comments. Feel free to call – (866) 323-5404 ext. 4 – or send an email – Martin.Greenlee@ZoomGrants.com .

We hope to have the privilege of working with the County of Hidalgo in the future.

Kind Regards,

Martin Greenlee
Sales and Customer Relations Manager
ZoomGrants™

Thank you for this opportunity to manage your upcoming application processes.

PROPOSAL ACCEPTANCE

I accept, for the duration indicated below, the ZoomGrants™ Proposed Solution and Price Estimate as described in this Proposal.



County of Hidalgo, TX

Select Duration Initial to Confirm

- 1 year _____
- 2 years _____
- 3 years _____

Signature

Printed Name

Title

Date

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. GrantAnalyst.com, LLC		
	2 Business name/disregarded entity name, if different from above ZoomGrants		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate		
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.		
	<input type="checkbox"/> Other (see instructions) ▶ _____		
	5 Address (number, street, and apt. or suite no.) See instructions. 8155 E Fairmount Dr #1221		Requester's name and address (optional)
6 City, state, and ZIP code Denver, CO 80230			
7 List account number(s) here (optional)			

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
3	2	-	0	0	3	4	1	8	1

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶	Date ▶ 1-3-18
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.
 Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

OFFICE USE ONLY CERTIFICATION OF FILING

1 Name of business entity filing form, and the city, state and country of the business entity's place of business.
 ZoomGrants
 Denver, CO United States

Certificate Number:
 2018-334745

Date Filed:
 04/05/2018

Date Acknowledged:
 04/05/2018

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.
 Hidalgo County

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

n/a
 Online grant technology

4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary

5 Check only if there is NO Interested Party.

6 UNSWORN DECLARATION

My name is _____, and my date of birth is _____.

My address is _____, _____, _____, _____, _____.
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in _____ County, State of _____, on the _____ day of _____, 20____.
(month) (year)

 Signature of authorized agent of contracting business entity
 (Declarant)

CERTIFICATE OF INTERESTED PARTIES

FORM 1295

1 of 1

Complete Nos. 1 - 4 and 6 if there are interested parties.
Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

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1 Name of business entity filing form, and the city, state and country of the business entity's place of business.
ZoomGrants
Denver, CO United States

Certificate Number:
2018-334745

Date Filed:
04/05/2018

2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed.
Hidalgo County

Date Acknowledged:

3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.
n/a
Online grant technology

4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary

5 Check only if there is NO Interested Party.

6 UNSWORN DECLARATION

My name is Geoff Hamilton, and my date of birth is 2-7-72

My address is 8155 E Fairmount Dr 1221, Denver, CO, 80230, USA
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in Denver County, State of Colorado, on the 4 day of April, 2018.
(month) (year)



Signature of authorized agent of contracting business entity
(Declarant)