

## **Selection Process of Grant Management Software**

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### **Selection Process of Grant Management Software**

The City of Medford's Housing Community and Development Division (HCD) seeks to select grant management software to effectively manage federal, state, private, and local grants.

### **Justification: The Need for Grant Management Software**

The HCD requires grant management software to assist with substantial division growth that has occurred since April 2019; adhere to best practices by federal funders; overcome existing challenges with maintaining the accuracy of data collection within a federal database; streamline data collection across all funding sources; and improve the experience for grant applicants, grant reviewers, program participants, and staff administrators through software utilizing roles through role-based access control (RBAC), assigning users to specific roles to provide and control database access (Bourgeois, 2014).

### **Substantial Division Growth**

City of Medford's Grant Administrator Aleia Fletcher started in the HCD in April 2019. Staff initially administered primarily the Community Development Block Grant (CDBG) from the U.S. Department of Housing and Urban Development (HUD), approximately \$700,000 - \$750,000 per year, along with the Neighborhood Stabilization Program (NSP) (with funding exhausted) but which required regular maintenance for compliance.

In 2019, the Housing Opportunity Fund began awarding funding typically between \$400,000 - \$680,000 annually, stemming from the creation of the construction excise tax of 1/3 of 1% on residential, commercial, and industrial building permit valuations in Medford, OR. In January 2020, before the COVID-19 pandemic, the HCD consolidated local funding from the City Manager's Office to administer the biannual General Fund Grant (GFG) funding of \$300,100. In 2019 and 2020, due to the CDBG CARES Act, additional CDBG funding of around \$1 million was received to help prevent, prepare, and respond to the COVID-19 pandemic. Moreover, in 2021, the City received its first Lead-Based Paint and Healthy Homes awards (referred to combined as LBP) from HUD of \$2,140,542 for the biennium.

Refer to Figure 1 for an overview of recent funding growth, demonstrating how the HCD went from administering \$2,594,988 annually in 2018 to \$3,784,089 annually in 2021 (excluding additional \$5.05 million to administer large acquisition projects, Project Turnkey and the Navigation Center) to an annual estimated \$4,089,881 with the recently awarded LBP grant in upcoming 2023.

While the HCD has substantially grown with the administration of federal and local funding, staff has remained at two employees. Recently, the City of Medford began prospectively seeking to increase staffing by one full-time employee to assist with the administration of complex housing and community development projects, including the LBP grant and CDBG projects. However, to continue the HCD's success, grant management software must be implemented to streamline grant administration of significant funding, ensure compliance, and maintain (with intent to increase) overall staff capacity.

#### **Adherence to Federal Best Practices**

According to HUD's best practices, HUD encourages "[i]nvest[ing] in [g]rant [a]dministration [s]oftware [t]hat [c]an [b]e [u]sed [a]cross [p]rograms" (HUD, 2021a, p. 16). HUD emphasizes that paper documentation increases inefficiencies, leading to a stronger potential for human error and challenges with data collection across federal and all funding sources. Because of these challenges, HUD recommends "[i]nvesting in grant administration software and deploy[ing] an end-to-end, web-based grant management system" (2021a, p. 16). With the implementation of grant management software, the likelihood of human error will decrease, administrative capacity will likely increase (leading to decreased time on administrative activities and increasing time on additional crucial matters, such as providing technical assistance to grant recipients, monitoring, and maintaining compliance), and data collection will be streamlined across funding sources in one centralized location, ensuring accuracy and transparency to funders, key stakeholders, and citizens alike (HUD, 2021a).

### **Overcoming Challenges with Data Collection Accuracy in Federal Database**

The federal CDBG program by HUD requires the use of the Integrated Disbursement and Information System (IDIS) database. Unfortunately, IDIS does not always reflect accurate data due to issues with duplicating numbers and missing data when not connected to a program/project anticipated to complete within the current year or if funded in a year associated with another Consolidated Plan, a plan generated every five years which guides federal and local funding priorities.

Because of this, staff must keep track of data outside of IDIS (currently using Excel) because of known issues with IDIS and the Consolidated Annual Performance Evaluation Report (CAPER), an annual report to HUD regarding performance outcomes achieved throughout each year (HUD, 2021b).

### **Streamlining Data Collection Across Funding Sources**

With a centralized database, data collection would streamline across funding sources. Multiple spreadsheets would not be needed for each funding source. As Pombriant (2021) explained, “Without a centralized location where data from one system flows into another, a business’s information sprawls into multiple isolated silos” (para. 8).

As of this week, a recent funding opportunity became unexpectedly available, requiring staff to quickly shift obligations to meet a pressing deadline and provide key performance data across funding sources within a few hours. The use of a centralized database would allow staff to better respond expeditiously when unexpected funding becomes available. Through the use of software, key performance outcomes can be linked together in efforts to demonstrate the impact of funding across programs (such as programs assisting individuals experiencing homelessness), being used as leverage to capture future funding opportunities (Johnson, 2021).

### **Improving Experience for Grant Applicants, Reviewers, Program Participants, and Staff**

The use of a centralized, easy-to-use platform will positively impact grant applicants, reviewers, program participants, and staff, which is of key importance as all are involved within the grant process

(Pombriant, 2021). Using RBAC, users have defined roles, allowing specified access for grant applicants applying for grants, reviewers scoring grant applications, grant recipients reporting on data, grant program participants who are directly served, and staff successfully administering the overall process. Currently, grant applications exist within Qualtrics survey software, but this is ineffective as this does not integrate with grant management software and was not intended for grant management.

### **Selection Process for Grant Management Software**

Due to the rising need for grant management software, staff identified prospective solutions through attending webinars by HUD (2020) and National Community Development Association ([NCDA], 2021; 2022). All webinars featured Neighborly and ZoomGrants software; thus, staff selected these as the best options to evaluate. Both softwares are considered SaaS, “Software as a Service[, which] enables service subscribers to access a software application from a software vendor through the web” with software existing via cloud services (Wu, 2011, p. 15057). In addition, both vendors strongly value and protect Personally Identifiable Information (PII). Neighborly uses Microsoft Azure for cloud storage, encrypts data at rest “using FIPS 140-2 validated 256 bit AES encryption” and in transit “by using SSL 2048 bit SHA-2 (https) encryption” and recently became SOC2 Type 1 compliant with SOC2 Type 2 within the next six months (Neighborly, 2022; M. Greenlee, personal communication, February 3, 2022). ZoomGrants runs on MySQL and MS SQL Server 2017 with data also encrypted at rest and in transit, featuring complete redundancy (2022). Staff also researched the capability of current finance software, FinanceEnterprise (reviewing three software options to comply with best practices by HUD and for procurement) but quickly discovered this software would not adequately encompass the entire application process (of applying, scoring, reporting, and monitoring) and was therefore eliminated as a prospective choice early on.

## **Development Process**

To start the selection process, staff referred to Pendergraft and Blakely (2010) to develop an in-depth process and plan for the selection and implementation of grant management software.

### ***Identified Project Team***

Staff identified members of the project team, including at least one high-level executive and key stakeholders across departments. The project team consisted of: members from HCD (as primary users), a supervisor from the Planning Department (where HCD is located), a high-level executive from the City Manager's Office to help assist with executive buy-in, IT to ensure proper security, and a supervisor from the Finance Department. Refer to Table 1 for complete details. The team also garnered insight into the complexities of administering federal funding for the HCD, achieving further buy-in from City staff.

### ***Identified Documentation to be Integrated and Managed***

As suggested by Pendergraft and Blakely (2010), staff evaluated existing processes for improvement. Staff determined the need for grant management software, realizing that Qualtrics software (while helpful) was not an end-to-end solution for grant management. Staff also reviewed existing FinanceEnterprise software as a potential software solution, which was eliminated due to the inability to perform all required components necessary for grant management.

Staff identified documentation that needs to be integrated into the software, which includes current and recent (within the past two to three years) CDBG and GFG files. While this will be labor and time-intensive, this will be pivotal moving forward.

### ***Prioritized Needs via Checklist Development***

Staff developed a comprehensive checklist for software providers to complete and assist with evaluation, helping ensure crucial components were covered in software demonstrations and used for staff follow-up. The checklist was effectively used as a wishlist of important features (Freidman, 2002).



Key features include the application process, the scoring process, federal grant-specific features, contracts, reporting, funding requests, technical assistance, security, finance, monitoring, and cost.

Refer to Table 2 for a complete checklist with criteria.

Staff also determined the importance of priorities as “Must Have[,]... Expected[,]... or Desired,” utilizing the City of Austin (2018) as an example to refine priorities (p. 32).

### ***Prequalified and Pre-evaluated Software***

Staff initially prequalified software solutions (discussed above) via HUD and NCDAs webinars (HUD, 2020; NCDAs, 2020 & 2021). Additionally, staff also sought software that was utilized by neighboring jurisdictions in Oregon (if possible) and concluded that neighboring jurisdictions used both Neighborly and ZoomGrants software.

As suggested by Pendergraft and Blakely (2010), staff conducted introductory conferences (before software service providers met with the team for a software demonstration) to discuss priorities, checklist, and review key components. Refer to Table 3 for Neighborly’s completed checklist and Table 4 for ZoomGrants’ completed checklist.

### ***Interviewed Software Users***

Staff developed interview questions for current software users (Friedman, 2002; Pendergraft & Blakely, 2010). Staff located and interviewed software users from community partners (with a preference in Oregon to align with local industry standards), receiving further software demonstrations. Refer to Appendix A for interview questions.

Interviews provided key insight into software usage. For Neighborly software, City of Medford staff interviewed software users from the City of Bend, Clark County, and the City of Vancouver, and for ZoomGrants software, the City of Beaverton, Clark County, City of Hillsboro, and the City of Vancouver.

While located in Washington, Clark County and the City of Vancouver had representatives with the unique experience of using both Neighborly and ZoomGrants. Clark County switched from

ZoomGrants three years ago to Neighborly due to the need for loan management (tracking and servicing amortized, low-interest, and forgivable loans) and the overall cost-benefit (S. Whitley & R. Royce, personal communication, February 10, 2022). Neighborly's loan management module includes the capability to generate: payment coupons, 1098s for taxes, promissory notes, and deed of trusts. Neighborly also allows for program participant portals for LBP and the ability to verify income eligibility through the review of income and assets in the household compared to HUD's local income limits based on household size. Neighborly also utilizes IDIS activity codes, which is helpful when working in HUD's IDIS system. Neither Neighborly nor ZoomGrants have direct integration with HUD's IDIS system, but Neighborly is actively seeking to remedy this. Interviewees classified Neighborly as future-oriented, forward-thinking, the wave of the future, and is set up in a big picture way, growing and adapting to meet the changing needs of the industry (R. Baker, personal communication, February 4, 2022; S. Whitley & R. Royce, personal communication, February 10, 2022).

Key challenges identified with Neighborly include a paradigm shift for how staff traditionally thinks about funding, as system is built with modules (such as public service programs/social service programs, down payment assistance and microenterprise assistance, affordable housing, and public facilities and infrastructure) versus by each funding source; applications do not auto-save and each question must be answered prior to proceeding; the inability for applicants to return to saved segments and adjust responses without staff reopening application segments; technological assistance provided to administrators but not to reviewers, applicants, or program participants; inability to review user guides and training materials prior to software subscription (due to desire of Neighborly to maintain a competitive advantage); and inability to automatically verify an active Federal Employer Identification Number (FEIN)/tax ID, Data Universal Numbering System (DUNS) number from Dun & Bradstreet, and federal System for Award Management (SAM) status.

ZoomGrants maintained competitiveness with Neighborly. Interviewees expressed strong support regarding technical assistance of ZoomGrants to administrative users (M. Gawf, personal communication, January 21, 2022; O. Martinez, personal communication, January 31, 2022; K. Peoples, personal communication, February 4, 2022; S. Whitley & R. Royce, personal communication, February 10, 2022). In addition, ZoomGrants allowed applicants to adjust their grant applications (as needed) before final submission; allows for autosaving; has an overall intuitive process for administrators, applicants, and reviewers; automatically verifies active EIN, DUNS, and SAMs status; and allows prospective administrators access to review technical assistance library before subscription. Primary negatives associated with ZoomGrants include the inability to track amortized loans; cost based annually upon the number of applications (making this more expensive with future growth); and the inability for LBP portals to automatically calculate income and assets. ZoomGrants was described as tried-and-true by interviewees but not as innovative as Neighborly.

### **Final Steps**

#### **Making the Decision**

While the final decision will occur in the future due to time constraints, to prioritize end-user involvement, staff completed an overall comparison of Neighborly and ZoomGrants using subjective and objective criteria. Staff also completed a cost analysis; refer to Table 6.

Based on the preliminary end-user comparison, Neighborly and ZoomGrants maintained competitiveness when scoring. Neighborly scored 1 point higher due to advanced capabilities (receiving 48 points) versus ZoomGrants (47 points). Staff will discuss this analysis and preliminary comparison with direct management for feedback and then review these results with the team.

#### **Plan for Implementation**

Staff anticipates a final decision to occur by or before April 2022 and to begin implementation thereafter, due to required organizational processes and responsibilities.

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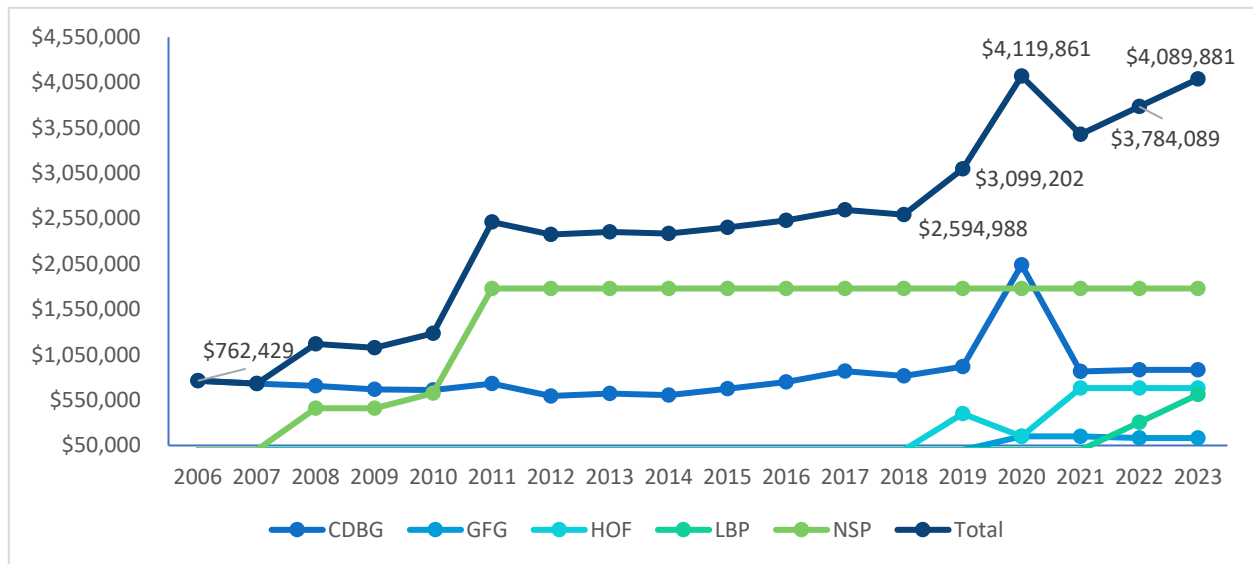
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**Figure 1**

*City of Medford Funding History, 2006 – 2023 (estimated)*



*Note.* CDBG refers to the Community Development Block Grant; GFG to the General Fund Grant; HOF to the Housing Opportunity Fund grant; LBP to the Lead-Based Paint grant (combining the Lead Hazard Reduction and Healthy Homes grants); NSP refers to the Neighborhood Stabilization Program grant; and total refers to total funding received from the above grants.

\* Funding does not reflect an additional \$2.5 million from the Oregon State Legislature to acquire the Navigation Center, a one-stop resource for individuals experiencing homelessness to seek emergency shelter and services, nor \$2.25 million from the Oregon Community Foundation for Project Turnkey, acquiring the prior Redwood Inn Motel in Medford to convert to transitional housing to support wildfire victims and individuals experiencing homelessness.

**Table 1***Grant Management Software Selection Team*

<b>First Name</b>	<b>Last Name</b>	<b>Title</b>
Julia	Back	Junior Systems Analyst – Information Technology (IT) Department
Angela	Durant	Supervisor – Housing and Community Development, Planning Department
Aleia	Fletcher	Grant Administrator – Housing and Community Development, Planning Department
Sheila	Giorgetti	Office Administrator – Planning Department
Donna	Holtz	Chief Administrative Officer – City Manager's Office Department
Trevor	Williams	Accounting Supervisor – Finance Department



**Table 2***Grant Management Software Selection Checklist*

	<b>Software:</b>			
	<b>Date:</b>			
	<b>Contact:</b>			
	<b>Reviewer:</b>			
<b><u>Recording</u></b>		<b>Notes</b>		
Will a recording be made available?				
<b><u>Application</u></b>	<b>Notes</b>	<b>Importance</b>	<b><i>By Staff</i></b>	
How does the software allow for the entire application process?		Must Have		
How are user portals created for applicants to log into? May applicants intermittently save their applications, and how does this process work?		Must Have		
May applicants apply more than once during each funding cycle?		Must Have		
How may applicants preview application questions?		Must Have		
May staff also submit applications (when needed)?		Must Have		
May applicants upload documents, as needed?		Must Have		
Does the software allow for simple calculations in the application (such as addition/subtraction and percentages)? Does software allow for more complex calculations and linkages?		Expected		
Are applicants able to save a copy of their entire application upon grant submission?		Must Have		
Are user portals also available for reviewers (commissioners) to easily review the applications and supporting documents?		Must Have		

May staff upload/amend documents, as needed? (I.e., requesting additional information)	Expected		
What are the options to compile scoring results from commissioners? Is it possible to remove the highest and lowest scoring results and average the remaining?	Expected		
<b><u>Grant Specific: CDBG, Lead Hazard Reduction, and Healthy Homes</u></b>	<b>Notes</b>	<b>Importance</b>	<b>By Staff</b>
How does the software specifically incorporate elements of the Community Development Block Grant (CDBG) to ease with administration?		Must Have	
How does the software assist with CDBG Capital Improvement Projects (CIPs) administration?		Must Have	
What capability is available to track and store forgivable liens for future returns of program income for the Homeowner Repair Program?		Desired	
How does the software assist with CDBG Public Service Programs (PSPs) administration?		Must Have	
How does the software incorporate elements to assist with Lead Hazard Reduction and Healthy Homes administration?		Expected	
What is the capability to input customized notes/client logs regarding important discussions with each grant recipient? Is there a way to input reminder dates on either a calendar in the software and/or have this exported into Outlook		Must Have	

<b><u>Contracts</u></b>	<b>Notes</b>	<b>Importance</b>	<b><i>By Staff</i></b>
How does the software handle the flow of contracts? Is it possible to have templates with amendable portions?		Expected	
<b><u>Reporting &amp; Voucher Reimbursements</u></b>	<b>Notes</b>	<b>Importance</b>	<b><i>By Staff</i></b>
Are grant recipients able to enter reports via software?		Must Have	
Does software allow for customization of reporting fields for each grant recipient (when necessary)?		Must Have	
Example: Customized Specific Indicator Report in CIP reporting template			
Reporting Elements Needed		Must Have	
<b>Narrative</b>			
<ul style="list-style-type: none"> <li>• Successes</li> <li>• Challenges</li> <li>• Indication of Progress Between Actuals vs. Projections</li> </ul>			
<b>Grantee Performance Report</b>			
Crucial reporting elements – # served by:			
<ul style="list-style-type: none"> <li>• Income level (show income chart) <ul style="list-style-type: none"> <li>○ For those who require income verification, does software allow capability to input household income and automatically determine if 30%, 50%, or 80% Area Median Income (AMI), according to HUD's</li> </ul> </li> </ul>			

<hr/> <p>income limits for Medford?</p> <ul style="list-style-type: none"> <li>○ For General Fund Grant (GFG), can we add an undisclosed category for reporting? (Do not want this for CDBG)</li> <li>• Race <ul style="list-style-type: none"> <li>○ For GFG, can add an undisclosed category? (Do not want for CDBG)</li> </ul> </li> <li>• Ethnicity</li> <li>• Veterans</li> <li>• Female head of households</li> <li>• Disabilities</li> <li>• Seniors</li> <li>• Homeless – w/ ability to link to definition</li> <li>• CDBG funds requested</li> <li>• Leverage <ul style="list-style-type: none"> <li>○ Other HUD Funds</li> <li>○ HOME</li> <li>○ HOPWA</li> <li>○ ESG</li> <li>○ Foundations/Grants</li> <li>○ Other Federal Funds</li> <li>○ State/Local Funds</li> <li>○ Private Contributions</li> <li>○ Program Fees/Dues</li> </ul> </li> </ul>	
<p>Is it possible to display an error message to grant recipient when the total number served under income level <b><u>does not equal</u></b> the total number served under race?</p>	Desired
<p>May staff adjust reporting, if errors are found?</p> <hr/>	Expected

Is it possible to export voucher reimbursement requests and reporting to PDFs to allow for approval from staff (department head)?		Must Have	
Do reports link up to IDIS? If not, is there an easy way to copy reporting information?		Expected	
For housing & community development projects and specific information needed for IDIS, are there customized reporting templates to address the additional information that needs to be collected?		Desired	
<b><u>Technical Assistance</u></b>	<b>Notes</b>	<b>Importance</b>	<b>By Staff</b>
What training/technical assistance is provided when onboarding the software?		Must Have	
What materials are available to provide technical assistance?		Must Have	
What is the turnaround time for responses to technological difficulties?		Must Have	
How do future upgrades work?		Must Have	
<b><u>Security</u></b>	<b>Notes</b>	<b>Importance</b>	<b>By Staff</b>
How is Personally Identifiable Information (PII) protected and secured?		Must Have	
<b><u>Finance</u></b>	<b>Notes</b>	<b>Importance</b>	<b>By Staff</b>
How will FinanceEnterprise be able to integrate with system?		Desired	
May staff internally adjust voucher reimbursements if errors are found?		Must Have	
Would we be able to input grants currently in process (with some funds already expended)?		Must Have	
<b><u>Monitoring</u></b>	<b>Notes</b>	<b>Importance</b>	<b>By Staff</b>
What features are available to assist with grant recipient monitoring?		Expected	

May grant recipients  
upload documents  
securely for  
monitoring?

Must Have

**Cost**

**Notes**

**Importance**

***By Staff***

How does the cost  
work?

Is cost specific to each  
grant program or  
user? If grant or user,  
what is the cost to  
add additional grants  
or users?

Medford administers  
CDBG, CDBG-CV  
(CARES Act), Lead-  
Based Paint (Lead  
Hazard Reduction and  
Healthy Homes),  
General Fund Grant,  
and other local  
funding sources

What is the cost of  
installation? Is this a  
one-time fee?

What is the annual  
cost of the software?

**Additional Notes**

**Table 3***Grant Management Software Selection Checklist – Neighborly*

	<b>Software:</b>	Benevate Inc. (dba. Neighborly Software)
	<b>Date:</b>	1/25/2022
	<b>Contact:</b>	Martin Greenlee, Senior Vice President of Sales
<b><u>Recording</u></b>		<b>Notes</b>
Will a recording be made available?		Yes
<b><u>Application</u></b>		<b>Notes</b>
How does the software allow for the entire application process?		See below
How are user portals created for applicants to log into? May applicants intermittently save their applications, and how does this process work?		Neighborly Software has four unique portals setup for Administrators, Reviewers, Participants, and Contractors. The Participant portal allows grant recipients, homeowners, developers, tenants, etc. to create their own login and password and apply for the city's funding programs. The participant can save their work and come back and finish it another time. Neighborly Software has an extremely intuitive and guided application experience with required fields and enforces those data fields and certain document uploads so that the city will receive a fully complete application at time of submittal.
May applicants apply more than once during each funding cycle?		Yes, this is a configurable setting that administrators can set.
How may applicants preview application questions in advance?		By viewing a PDF or Word version made available on the City's website—Neighborly software will generate.
May staff also submit applications (when needed)?		Yes, standard functionality.
May applicants upload documents, as needed?		Yes, standard functionality.
Does the software allow for simple calculations in the application (such as addition/subtraction and percentages)? Does software allow for more complex calculations and linkages?		Yes, the software allows for simple calculations. More complex calculations and linkages will need more information to appropriately answer.
Are applicants able to save a copy of their entire application upon grant submission?		Yes, standard functionality. They can also PDF and print/save.

Are user portals also available for commissioners to easily review the applications and supporting documents?	Yes, standard functionality. There is no cost for Reviewers to access the reviewer portal. Reviewers can be assigned to a batch of applications and review the content, provide scores, comments, and funding recommendations.
May staff upload/amend documents, as needed? (i.e., requesting additional information)	Yes, standard functionality.
What are the options to compile scoring results from commissioners? Is it possible to remove the highest and lowest scoring results and average the remaining?	Neighborly Software compiles all the scores and tracks what reviewers have completed or not and averages the scores together for a comprehensive average score. There is no limit on the number of scoring questions and can be sectioned with subtotals per section. Yes, the scores can have Olympic Scoring built in.
<b><u>Grant Specific: CDBG, Lead Hazard Reduction, and Healthy Homes</u></b>	
How does the software specifically incorporate elements of the Community Development Block Grant (CDBG) to ease with administration?	The system is used by over 300 CDBG entitlements/participating-jurisdictions nationwide. Neighborly Software has a variety of best practices that they can share with the city. Some specific elements that are included are Household Income/Asset verification and calculation against the city's HUD income limits. Other features include but are not limited to; reporting on Accomplishments unique to what is asked in IDIS, Lead Based Paint and Environmental Review questions, Census Tract information, Drawdown capabilities, Funding tracking that is real time with program income documentation features and calculations as well.
How does the software assist with CDBG Capital Improvement Projects (CIPs) administration?	CDBG CIP is a very common use of our software for nearly everyone of our 300+ 'neighbors' (e.g. clients) that use our software. Our software is designed, tested, and built specifically for this and many other CDBG related programs.
What capability is available to track and store forgivable liens for future returns of program income for the Homeowner Repair Program?	Neighborly Software has an out-of-the-box Funding module and Loan Module that comes complimentary with the software. Within the Loan Module; our system tracks forgivable, deferred, and amortized loans. Nearly all of our clients use this loan module to service and process loans for Down Payment Assistance, Housing Rehabilitation, Economic Development, and Affordable Housing Construction related loans.
How does the software assist with CDBG Public Service Programs (PSPs) administration?	CDBG Public Services is by far the most commonly used program by our 'neighbors' nationwide. We have a best practice that can be configured unique for the city. The program allows grant recipients to apply, upload supporting documentation, track the award based on unique budget



	categories, submit accomplishment reporting on a set frequency with automatic reminders and request drawdowns, etc. At the end of the day all accomplishments can be reconciled with IDIS and rolled up across all PS activities for assistance with the CAPER.
How does the software incorporate elements to assist with Lead Hazard Reduction and Healthy Homes administration?	Neighborly Software has unique features and functionality that can assist in the administration of Lead Based Paint Hazard Reduction activities. Our system has the ability for homeowners to apply online, upload documentation and confirm eligibility for the program. Once submitted, the city can use Neighborly Software to manage the workflow, inspections, and work write-ups (via tablet/smartphone out in the field) needs. Our system has been used for a statewide LHR program as well as many other local governments to assist with their LHR funding activities.
What is the capability to input customized notes/client log regarding important discussions with each grant recipient? Is there a way to input reminder dates on either a calendar in Neighborly Software and/or have this exported into Outlook	Neighborly Software has a variety of places to log information/notes/observations/calls, etc. in our Audit Log that takes a name, time, date stamp of all transactions, approvals, and notes.  Neighborly does have email features but no link to outlook calendar. Certainly something we are considering for future development.
<b><u>Contracts</u></b>	<b>Notes</b>
How does the software handle the flow of contracts? Is it possible to have templates with amendable portions?	Neighborly Software can render your contracts, loan documents, letters, etc. that merges case data into your city approved documents. Many of our clients have their contracts and the many unique versions pre-loaded and available to generate with the click of a mouse.
<b><u>Reporting &amp; Voucher Reimbursements</u></b>	<b>Notes</b>
Are grant recipients able to enter reports via software?	Yes, standard functionality. All data can be rolled up on an individual case/grant recipient level and program-wide. Reports can be filtered by status, demographics, program/accomplishment year, etc.
Does software allow for customization of reporting fields for each grant recipient (when necessary)?	Yes, standard functionality.

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Example: Customized Specific  
Indicator Report in CIP reporting  
template

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Reporting Elements Needed

**Narrative**

- Successes
- Challenges
- Indication of Progress  
Between Actuals vs.  
Projections

Yes, standard functionality and our reports are configurable unique to the questioning needed. What is also unique with Neighborly Software compared to other software vendors is that Neighborly Software allows the city to set the unique criteria that one grant recipient needs to report on over what another grant recipient may need to report on.

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**Grantee Performance Report**

Crucial reporting elements – #  
served by:

- Income level (show income  
chart)
    - For those who are  
not presumed  
benefit and require  
income verification,  
does software  
allow capability to  
input household  
income and  
automatically  
determine if 30%,  
50%, or 80% Area  
Median Income  
(AMI), according to  
HUD's income  
limits for Medford?
    - For General Fund  
Grant (GFG), can  
we add an  
undisclosed  
category for  
reporting? (Do not  
want this for CDBG)
  - Race
    - For GFG, can add  
undisclosed  
category? (Do not  
want for CDBG)
-

- 
- Ethnicity
  - Veterans
  - Female head of households
  - Disabilities
  - Seniors
  - Homeless – w/ ability to link to definition
  - CDBG funds requested
  - Leverage
    - Other HUD Funds
    - HOME
    - HOPWA
    - ESG
    - Foundations/Grants
    - Other Federal Funds
    - State/Local Funds
    - Private Contributions
    - Program Fees/Dues

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Is it possible to display an error message to grant recipients when the total number served under income level <b><u>does not equal</u></b> the total number served under race?	The system does not display an error message. However, once submitted and reviewed, it is easy to send back for corrections and resubmittal.
May staff adjust reporting, if errors are found?	Yes, standard functionality.
Is it possible to export voucher reimbursement requests and reporting to PDFs to allow for approval from staff (department head)?	Yes, standard functionality.
Do reports link up to IDIS? If not, is there an easy way to copy reporting information?	The IDIS integration project will be completed in the latter part of 2022. Currently all data and information that needs to be inputted into IDIS is easily reconciled for data entry.
For CIPs/housing & development projects and specific information needed for IDIS, are there	Yes, standard functionality.

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customized reporting templates to address the additional information that needs to be collected?

<b><u>Technical Assistance</u></b>	<b>Notes</b>
What training/technical assistance is provided when onboarding the software?	<p>Neighborly Software at time of initiating the Implementation Process will be assigned an Implementation Lead. The Implementation Lead will guide you through 5 meetings over the course of approximately 6 weeks to implement up to four (4) programs in a given implementation phase. During this time, the city will receive training and have the ability to test the system and provide feedback/edits as needed. Once the system is ready for 'Go-Live' the Implementation Lead will schedule a training to go over everything.</p> <p>Once the system is live and the city is underway, the city will be assigned to a Client Success Manager. The individual assigned to the city's account will be the point of contact for all training needs, edits, add new programs, etc. There is no limit and/or costs to receive virtual training. There is also unlimited support and technical assistance available.</p>
What materials are available to provide technical assistance?	Videos, guides, etc.
What is the turnaround time for responses to technological difficulties?	Neighborly Software has invested heavily on our support team based in Atlanta, GA. Technical Support is available M-F 8am – 8pm EST. Our support team manages an enormous amount of tickets each week. Just last week we solved nearly 3,000 support tickets with a satisfaction score of over 70%!
How do future upgrades work?	Future upgrades are included with 100% cloud/web/browser-based, and we are constantly updating the software.

<b><u>Security</u></b>	<b>Notes</b>
How is Personally Identifiable Information (PII) protected and secured?	All PII is stored and protected on a USFedRAMP certified Microsoft Tier IV data center that has the highest level of encryption available. Our software is SOC2Type1 compliant and soon will have SOC2Type2 compliance certification.

<b><u>Finance</u></b>	<b>Notes</b>
How will FinanceEnterprise be able to integrate with system?	Neighborly Software does not integrate with ERP or other financial systems direction. Information can be exported in imported to a lot of those systems.
May staff internally adjust voucher reimbursements if errors are found?	Depends on the error. In most cases yes and in others for auditing purposes, you would want to send back the invoice to document the edit/change in the Audit Log.

Would we be able to input grants currently in process (with some funds already expended)?	Yes, standard functionality.
<b><u>Monitoring</u></b>	<b>Notes</b>
What features are available to assist with grant recipient monitoring?	Neighborly Software has configurable grant recipient monitoring checklists available to be completed within the software either as a desk monitoring or live and on-site.
May grant recipients upload documents securely for monitoring?	Yes, standard functionality.
<b><u>Cost</u></b>	<b>Notes</b>
How does the cost work?	<p>Neighborly Software is a hosted software solution that is billed annually in advance. Billing is broken out into two categories: one-time implementation costs and annual recurring costs.</p> <p>Annual recurring costs:</p> <p>Licenses 1-10: \$200/mo paid annually in advance (x12 mo) = TOTAL</p> <p>Licenses 11+: \$150/mo paid annually in advance (x12 mo) = TOTAL</p> <p>One Time Implementation costs:</p> <p>\$2,000 per program (e.g. Public Services, Single Family Housing Rehab, Lead Based Paint, General Fund Grant)</p>
Is cost specific to each grant program or user? If grant or user, what is the cost to add additional grants or users?	Explained above.
Medford administers CDBG, CDBG-CV (CARES Act), Lead Based Paint (Lead Hazard Reduction and Healthy Homes), General Fund Grant, and other local funding sources	
What is the cost of installation? Is this a one-time fee?	Implementation costs are one-time and priced at \$2,000 per program.

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What is the annual cost of the software?

Based on the number of administrative licenses needed.

**Additional Notes**

N/A

**Table 4***Grant Management Software Selection Checklist – ZoomGrants*

	<b>Software:</b>	ZoomGrants
	<b>Date:</b>	1/20/2022
	<b>Contact:</b>	Lauren Silver, Customer Relationship Manager
<b><u>Recording</u></b>	<b>Notes</b>	
Will a recording be made available?	Yes	
<b><u>Application</u></b>	<b>Notes</b>	
Does the software allow for the entire application process?	The Summary tab of each application is standard information collected for all applicants and can be customized to some extent. The following additional tabs are optional for use: pre-application tab (auto or manually approve), Application Questions, Budget, Tables, and Documents. An Extra tab appears to allow follow-up questions specific to each applicant. The system also facilitates Committee or Reviewer Scoring, Contracts/Grant Agreements, Financial tracking, Reporting and many other post-award features to manage grant compliance.	
How are user portals created for applicants to log into? May applicants intermittently save their applications, and how does this process work?	The administrator is provided both a program or account-wide link to apply to distribute to potential applicants or display on its own website (ZoomGrants does NOT share this link on your behalf or post on its website). Applicants use this link to create their user account or to log in using their existing ZoomGrants account (where Auto-save feature	
May users apply more than once during each funding cycle?	Yes- Administrators can control settings to allow	
May staff also submit applications (when needed)?	Administrator can request ZoomGrants to 'hard submit' applications as needed.	
May applicants upload documents, as needed?	Yes-as many documents as needed may be uploaded; ZoomGrants can accept upload links or a wide variety of file format types as a computer file (limit of up to 4MB for each document).	
Does the software allow for simple calculations in the application (such as addition/subtraction and percentages)?	Yes-within the budget tab and tables built in the Tables tab	
Are applicants able to save a copy of their entire application upon grant submission?	Yes, or at any time thereafter when they log into their applicant account	

Are user portals also available for commissioners to easily review the applications and supporting documents?	Yes- they can be assigned as a 'Reviewer' or Administrator or given a 'read-only' link to access all applications and supporting documents for review
May staff upload/amend documents, as needed? (i.e., requesting additional information)	Yes – admin uploaded documents may be internal, or viewable to applicant
What are the options to compile scoring results from commissioners?	ZoomGrants can provide an 'Olympic Scoring' report which allows a scoring report to be generated which removes the highest and lowest scores from each application and averages the remaining scores. This report can be viewed/exported in the ZoomGrants <a href="#">Scoring</a> tab, where raw scores, votes and comments can easily be exported to Excel.

<b><u>CDBG Specific</u></b>	<b>Notes</b>
How does the software specifically incorporate elements of the Community Development Block Grant (CDBG) to ease with administration?	ZoomGrants has provided CDBG program support provides the user interface to provide a streamlined and easy way to not only collect competitive or non-competitive
How does the software assist with CDBG Capital Improvement Projects (CIPs) administration?	ZoomGrants can assist with the full grant management cycle and tracking compliance of CIP projects and a wide variety of other activities which may be funded under the CDBG program.
How does the software assist with CDBG Public Service Programs (PSPs) administration?	Public Service programs are especially easy in ZoomGrants, as it offers the user-friendly interface that service providers need to track beneficiary data and funding allocations by funding source. The Funding Sources feature helps track and ensure that no more than the allowed 15% of annual CDBG award goes toward public service activities.
What is the capability to input customized notes/a client log regarding important discussions with each grant recipient?	The Activity Log, Internal Research notes and 'Extra' Applicant follow-up questions all are examples of places where ZoomGrants allows a great deal of customizable fields which can capture notes, discussions and over applicant information.

<b><u>Reporting &amp; Voucher Reimbursements</u></b>	<b>Notes</b>
Are grant recipients able to enter reports via software?	Yes- up to 24 individual reports with independent deadlines may be established and ad hoc reports may be generated in the Data tab with this reporting data.
Does software allow for customization of reporting fields for each grant recipient (when necessary)?	Yes – customized questions, document requests, and templates may be provided.



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Example: Customized Specific  
Indicator Report in CIP reporting  
template

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Reporting Elements:

**Narrative**

- Successes
    - If the total number of those served program-wide in Medford varies (due to additional leverage) from what is reported on the Grantee Performance Report, please include the total number served in Medford (throughout the program) below.
  - Challenges
  - Indication of Progress Between Actuals vs. Projections
    - Please describe your progress towards your projected goals listed in the contract and whether you are on track, exceeding, or below your projections and why.
    - If your program/project seeks to reduce homelessness, please discuss your progress on ensuring that 85% of participants
- 

Can accommodate this text in the Reporting module. An Income level table can be included in the instructions at the top for reference, 25 reporting questions, a table for data captured as an exportable spreadsheet, and as many document requests/uploads as may be necessary.

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remain housed  
after six months  
following receiving  
assistance.

### **Grantee Performance Report**

Crucial reporting elements – #  
served by:

- Income level (show income chart)
    - For those who are not presumed benefit and require income verification, does software allow capability to input household income and automatically determine if 30%, 50%, or 80% AMI, according to HUD's income limits for Medford?
    - For GFG, can we add an undisclosed category for reporting? (Do not want this for CDBG)
  - Race
    - For GFG, can add undisclosed category? (Do not want for CDBG)
  - Ethnicity
  - Veterans
  - Female head of households
  - Disabilities
  - Seniors
  - Homeless – w/ ability to link to definition
  - CDBG funds requested
-

- Leverage
  - Other HUD Funds
  - HOME
  - HOPWA
  - ESG
  - Foundations/Grants
  - Other Federal Funds
  - State/Local Funds
  - Private Contributions
  - Program Fees/Dues

Is it possible to display an error message to grant recipients when the total number served under income level <b>does not equal</b> the total number served under race?	No – although totals will be provided that will show that they do not align, and which can be easily verified by the administrator.
May staff adjust reporting, if errors are found?	Yes – any administrator may also serve as a ‘Collaborator’ role for each application received or awarded funding.
Is it possible to export voucher reimbursement requests and reporting to PDFs to allow for approval from staff (department head)?	
Do reports link up to IDIS? If not, is there easy way to copy reporting information?	IDIS templates are available to effortlessly collect and compile data from grant recipients for reporting into IDIS.
For CIPs/housing development projects and specific information needed for IDIS, are there customized reporting templates to address the additional information that needs to be collected?	Tasks/Checklist, document templates, and Library resources may be provided to track compliance with Uniform Relocation Act, Davis-Bacon, Environmental Review, and other federal regulatory reporting requirements as they may apply to CIP/housing development projects.
What capability is available to track and store forgivable liens for future returns of program income for the Homeowner Repair Program?	The Funding Sources feature can help track different categories of program income and other sources of funding which may be reallocated to other program activities. Internal Research or custom data fields and reports can be created.

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How is Personally Identifiable Information (PII) protected?

There are several security measures in place that ensure the protection and availability of your data, ranging from the user level to the server level, and even the physical location of the servers.

First, all users are required to login with their own userid 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.

Upon their initial login, users set up a three-question security profile. If they forget their password, they must answer each question correctly before they can reset their password. If an administrator or committee member has forgotten their User ID, another administrator can look it up or reset it for them. If an applicant has forgotten their User ID, an administrator can refer to one of their applications to find the information, or the user can contact the ZoomGrants tech support desk for assistance.

Next, all pages and data transfers are encrypted 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 if you choose to embed your application on your site.

Finally, the data center where everything is housed has significant security and redundancy features in place, including:

- 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
-

	<ul style="list-style-type: none"> <li>•Nightly security updates</li> <li>•Incremental hourly and daily server backups</li> <li>•Nightly complete database backups</li> </ul>
What is the turnaround time for responses to technological difficulties?	The ZoomGrants support team handles all inbound technical inquiries from all users, including admin users, applicants, and committee members. Response time to calls and emails received during operating hours can be expected to be less than 2 hours, on average. Response times are often quicker depending on current call volume, complexity of the issue at hand and/or time of day which it was received. Most inquiries received through ZoomGrants Technical Support are resolved within the same day, or within 48 hours. Calls and emails received after hours or over the weekend will be attended to as soon as possible, with urgent inquiries being addressed first.
<b><u>Finance</u></b>	<b>Notes</b>
How will FinanceEnterprise be able to integrate with system?	ZoomGrants would not be able to provide is a true API connection or link with any financial software which you currently use. However, invoicing and financial data is gathered in the ZoomGrants interface and then easily exported into a wide variety of formats, including .csv or excel spreadsheets, which would allow data to then be imported into your payment system.
May staff internally adjust voucher reimbursements if errors are found?	Yes – the Contract Budget allows budget line-item tracking features to track grant reimbursements across each funded activity and show which funding sources are paying for each funded activity.
<b><u>Monitoring</u></b>	<b>Notes</b>
What features are available to assist with grant recipient monitoring?	The Financial Tracing and Reporting modules in ZoomGrants offer pre-built templates for tracking CDBG beneficiary performance data which must be verified by the administrator and entered into IDIS for HUD reporting purposes.
May grant recipients upload documents securely for monitoring?	<p>Yes- documents may be provided as computer file uploads in a wide variety of accepted formats. File size is limited to 4MB each but may accept as many documents as may be necessary. These are the supported file extensions:</p> <p>.DOC , .XLS , .XLSM , .DOCX , .XLSX , .TXT , .RTF , .WPS , .SXW , .ODT , .TAB , .CSV , .WKS , .SXC , .ODS , .PPT , .PPTX , .PPS , .SXI , .ODP , .PDF , .GIF , .JPG , .PNG , .MW , .WAV , .AIF , .MP3 , .MP4 , .MID , .MPG , .MOV , .WMV , .RM , .JPEG , .SHP , .SHX , .DBF , .KML , .KMZ , .TIF , .TIFF</p>
<b><u>Cost</u></b>	<b>Notes</b>

How does the cost work?	The ZoomGrants annual subscription cost is \$3,500. The per-program fee is \$2,500 and there is a one-time \$500 activation fee. For one program, the first-year cost is \$6,500 and the annual cost after would be \$6,000 (if a new RFP is issued each year).
Is cost specific to each grant program?  Medford administers CDBG, CDBG-CV (CARES Act), Lead Based Paint, General Fund Grant, and other local funding sources	The cost is not specific to each grant program, and some grant programs may be combined into one 'program' in ZoomGrants by utilizing a branching question. An administering organization purchases an annual subscription, which provides access to ZoomGrants, then individual programs (sometimes referred to as RFA's, RFP's, applications, etc.) are purchased. Each Program within the account may have up to 50 administrators assigned to it. Once opened to receive applications, programs can accept up to 500 new applications for up to a full 365 days (at base pricing). After that, the program can be used for review or post-decision purposes indefinitely (so long as the subscription is maintained). Technical support is also included for all users.
What is the cost of installation? Is this a one-time fee?	There is no hardware to install or software to download. There is a one-time \$500 account set-up fee.
What is the annual cost of the software?	The annual cost is \$6,500 in the first year if one program is purchased, and \$6,000 each year after that. Additional ZoomGrants programs/RFPs can be purchased as needed for \$2,500 each.

#### **Additional Notes**

More information about all features mentioned can be found in ZoomGrants University (<http://help.zoomgrants.com/>)

**Table 5***List of Software Demonstrations and Interviews*

<b>Software</b>	<b>Date</b>	<b>Contact</b>	<b>Type</b>
ZoomGrants	Thursday, 1/20/22 at 11 AM	Lauren Silver, Customer Relationship Manager, ZoomGrants	Demonstration
ZoomGrants	Friday, 1/21/22 at 11 AM	Mandy Gawf, Community Services Coordinator, City of Hillsboro	Interview
ZoomGrants	Monday, 1/31/22 at 4 PM	Omar Martinez, Community Development Program Coordinator, City of Hillsboro	Interview
ZoomGrants	Friday, 2/4/22 at 2 PM	Kathy Anderson Peoples, CDBG Project Coordinator, City of Beaverton	Interview
Neighborly	Thursday, 2/3/22 at 3:30 PM	Martin Greenlee, Neighborly	Demonstration
Neighborly	Friday, 2/4/22 at 11 AM	Racheal Baker, City of Bend, Affordable Housing Manager	Interview
Neighborly & ZoomGrants	Thursday, 2/10/22 at 2 PM	Rebecca Royce, Clark County (Washington), CDBG and HOME Coordinator (current employee)	Interview
		Samantha Whitley, City of Vancouver, Community Development Manager (former employee of Clark County – administered transition from ZoomGrants to Neighborly, worked for Clark County for over 20 years)	

**Table 6***Cost Analysis Comparison*

	<b>Neighborly</b>	<b>ZoomGrants</b>
<b>Description</b>	Based on number of users per month (estimating 3 users at \$200/month)	Based on number of applications – can do one application due to branching question
<b>Licensing</b>	3 users * (12 months * \$200) = \$7,200/year	\$3,500/year  Annual price per program/application = \$2,500
<b>Year One</b>	Software Implementation per Program (includes training, guides, and data migration)  \$2,000 per program  Affordable Housing, Public Service Programs, Infrastructure and Public Facilities  $\$2,000 * 3 = \$6,000 + \$7,200/\text{year} = \$13,200$	One-time activation fee of \$500  Training included  $\$3,500 + \$2,500 + \$500 = \$6,500$
<b>Year Two – Forward</b>	\$7,200/year	\$6,000/year  (If add second application, \$8,500/year; for third application, \$11,000/year)
<b>Analysis</b>	<p>Neighborly start-up costs are \$6,700 more than ZoomGrants. However, Neighborly includes ability to track repair liens, to allow participants to apply for Lead-Based Paint funding, and start-up costs one-time fees versus annually for ZoomGrants.</p> <p>As likely that ZoomGrants will need to have at least two applications, will need to pay \$8,500 for ZoomGrants per year versus Neighborly at \$7,200 per year.</p> <p>With change in costs annually (using \$7,200 for Neighborly and \$8,500 for ZoomGrants), savings from Neighborly means the City will break even on start-up costs of implementation in 5.15 years.</p> <p>As funding has already been identified and allocated for grant management software purchase and Neighborly software allows additional features to assist with administration, Neighborly is a strong investment for the long-term.</p>	



**Table 7***Software Selection Comparison*

Category	Neighborly	ZoomGrants
<b>History/Longevity</b> <i>Maximum Points – 5</i> Notes Neighborly was founded on June 1, 2016 (5.69 years) (Crunchbase, n.d.-a). While short history, Neighborly has grown as a significant competitor to ZoomGrants for grant administration.  ZoomGrants was founded on January 1, 2002 (20 years) (Crunchbase, n.d.-b)	3	5
<b>Application</b> <i>Maximum Points – 5</i> Ability for the software to handle the application process, including: <ul style="list-style-type: none"> <li>• Applicant user portals</li> <li>• Ability for applicants to save work &amp; save copy of application at end</li> <li>• Allowance applicants to apply more than once for each cycle</li> <li>• Ability for application to perform calculations</li> <li>• Ability for staff to adjust applications (when needed)</li> <li>• Portals for reviewers (commissioners) to review applications</li> <li>• Ability to collect scoring and remove the highest and lowest scores</li> <li>• Ability to preview application questions</li> </ul> Notes Neighborly received deduction points due to needing to have initial applications set up by software company; inability for applicants to go back to prior sections of an application once saved before prior final submission (as staff would have to be requested to reopen sections); application is not as intuitively/ aesthetically streamlined as competitor; and ZoomGrants allowing grant applicants and reviewers ability to contact for technological assistance, whereas Neighborly only allows administrators to receive technological assistance.  ZoomGrants received a deduction point due to less aesthetically/visually-pleasing platform.	3	4
<b>Grant Specific: CDBG, Lead-Based Paint</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>• Software incorporates elements to make CDBG easier to administer</li> <li>• Allows the ability to maintain client notes</li> <li>• Allows the ability to track amortized liens</li> <li>• Portals for Lead-Based Paint for administration</li> </ul> Notes	5	4

Category	Neighborly	ZoomGrants
<p>Neighborly allow for LBP participants to sign up online and eases significantly with administration via automatic income qualification process based on overview of income and assets in household (along with household size) compared to HUD's local income limits. Additionally, allows for the future-oriented prospect of tracking and servicing amortized liens to ensure HCD sustainability. While City does not currently have amortized liens, due to significant recent growth, strong possibility of this occurring in the future.</p> <p>ZoomGrants maintains as a strong competitor due to library of CDBG resources but does not have the ability for automatic income verification for participants or ability to track amortized liens.</p>		
<b>Contracts</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>Software allows templates for contracts</li> </ul> <p>Notes</p> <p>Both softwares allow for creation of contracts.</p> <p>Bonus point to Neighborly due to ability to generate Promissory Notes, Deed of Trusts, 1098s for homeowner rehabilitation and amortized liens.</p>	5	4
<b>Reporting</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>Does software allow grant recipients to enter reporting?</li> <li>Does software allow staff to customize reporting fields, as needed?</li> <li>Does software utilize IDIS codes?</li> </ul> <p>Notes</p> <p>Both softwares allow for customized reporting.</p> <p>Points awarded to Neighborly as IDIS activity codes are already within system but not yet associated with goals/outcomes (which must be designated by administrative staff).</p>	5	4
<b>Security</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>How is Personally Identifiable Information (PII) stored and secured?</li> </ul> <p>Notes</p> <p>For Neighborly, data is stored in US FedRAMP certified Tier IV Microsoft datacenters with geo-replication across multiple data centers. Data is encrypted at rest and in transit. Recently became SOC2 Type 1 compliant with SOC2 Type 2 within anticipated next six months. Extra point awarded due to SOC2 Type 1 compliance.</p> <p>ZoomGrants runs on MySQL and MS SQL Server 2017 with data also encrypted at rest and in transit, featuring complete redundancy (2022).</p>	5	4

Category	Neighborly	ZoomGrants
<b>Technical Assistance/Training</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>• Support for training/onboarding</li> <li>• Materials available for technical assistance</li> <li>• Average turnaround time to respond to technological difficulties</li> </ul>	4	5
<b>Notes</b> Neighborly received deduction points as prospective administrators are unable to access training materials/guides until subscribed to software, due to software provider desiring to maintain a competitive advantage. However, Neighborly and interviewees briefly showed this. Interviewees expressed satisfaction with technical assistance and training.  ZoomGrants allows access to ZoomGrants University prior to onboarding, which is helpful to review software in-depth. Interviewees expressed strong satisfaction with technical assistance and training.		
<b>User Experience &amp; Rapport</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>• Staff's feeling of rapport and comfort-level with software</li> </ul>	4	5
<b>Notes</b> Neighborly onboarding is provided by other training staff. While interviewees have expressed satisfaction with onboarding and training, City of Medford staff has felt less comfort with the unknown. Additionally, paradigm shift will take City staff time to acclimate to.  ZoomGrants maintains connection with initial staff member to provide onboarding and training. Multiple interviewees expressed extremely strong support. City staff has also echoed sentiments with ZoomGrants' follow-up.		
<b>Finance</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>• Integration with FinanceEnterprise</li> <li>• Ability to input grants currently in process</li> </ul>	4	4
<b>Notes</b> Neither software allows for integration with FinanceEnterprise. Staff finds this acceptable as do not currently have this functionality.  Both softwares allow you to input grants currently in process.		
<b>Monitoring</b> <i>Maximum Points – 5</i> <ul style="list-style-type: none"> <li>• Features to assist with grant recipient monitoring</li> <li>• Ability to upload grant recipients' documents securely for monitoring</li> </ul>	5	5

Category	Neighborly	ZoomGrants
Notes		
Both have customizable templates for monitoring.		
Cost	5	3
Maximum Points – 5		
<ul style="list-style-type: none"> <li>Effectiveness to incorporate multiple types of grants</li> </ul>		
Notes		
<p>Neighborly has significantly higher startup costs. However, once modules are setup, there are no additional annual costs associated with this, only for the number of administrative users.</p> <p>ZoomGrants has lower costs initially, if doing only one application, as is based upon the number of applications versus users. However, as grant funding is typically available at several different times within each year, would likely need to add a second (or third) application, making estimated costs \$8,500/year or \$11,000/year for three applications. With \$2,500 per year for each application for ZoomGrants versus \$2,000 for one-time implementation fees for Neighborly, Neighborly is more cost-effective long-term, breaking even after 5 years.</p>		
Total	48	47

## Appendix A

### Interview Questions

Name:

Position:

Software:

- How long have you been with your current organization, and how long have you administered CDBG and federal funding?
- How long have you been using the software?
- What has your experience using this software been like so far?
- What grants do you manage using this software? Are there any grants that you do not manage using this software? If so, why not? Is it possible to input grants into the software to manage but not use the full application process, and have you had experience with this?
- How long did it take to learn and understand the software well?
- How satisfied were you by the training provided by the software company? What was the onboarding process like?
- If you had to start the process of selecting and choosing software again, “what would... [you] do differently”, if anything (Pendergraft & Blakely, 2010, p. 42)? Would you approach anything differently?
- How are non-annual applications (i.e., if funding every 2-3 years) handled? How does the cost work with these non-annual applications?
- After the onboarding process, how satisfied are you with post-implementation support?
- What types of resources/guides did the software company provide? How satisfied are you with these guides?
- “What are [some of the] best features of the software?” (Pendergraft & Blakely, 2010, p. 42)

- What features are either negative or lacking from the software?
- What is one thing you wish you knew before purchasing and implementing this software?
- When technological glitches arise, how fast has customer service responded to your issue? How satisfied are you with the software company's technical assistance?
- What are your favorite features that you are using? What are you not using?
- Are you able to pull reports based on funding source? Are you able to pull reports based off of IDIS activity number?
- What features are you not using that you expected to use? Why not?
- "Did the implementation occur on time and within budget?" (Pendergraft & Blakely, 2010, p. 42)
- "Were there any surprises during start up?" (Pendergraft & Blakely, 2010, p. 42)
- How do applicants, reviewers, and program participants feel about using Neighborly software? What has their experience been like?