



STAFF BRIEFING

To: Grant Management Software Selection (GMSS) Team

From: Aleia Fletcher, Grant Administrator

Month: November 2022

Subject: Grant Management Software Selection

CONSIDERATION

Following extensive research and interviews, the City of Medford's Housing and Community Development Division (HCD) staff presents the following information for consideration and approval regarding the selection of grant management software to effectively manage federal, state, and local grant funding.

PREVIOUS MEETINGS ON THE TOPIC

On January 20, 2022, ZoomGrants provided a software demonstration to the GMSS.

On February 3, 2022 Neighborly provided a software demonstration to the GMSS.

SUMMARY AND BACKGROUND

Due to a substantial increase in the number of grant programs and funding administered through the HCD since April 2019, among other contributing factors, staff was directed to research software programs that could streamline the City's grant process. Furthermore, Council adopted a 2021-2023 Biennium Deliverable to review and streamline the City's existing grant making process to improve efficiency and maintain current level of service to the community and partner organizations using existing staff. This deliverable is located under Council's Health & Safety Goal to implement goals and actions identified in the Homeless System Action Plan.

Other factors that have triggered the need to select and implement grant management software include the need to: 1) adhere to best practices by federal funders; 2) overcome existing challenges with maintaining accuracy of data collection; 3) streamline data collection across federal, state, and local funding sources; 4) ensure compliance with funders; and 5) improve the overall experience through utilizing role-based access control (RBAC) software for grant applicants, grant reviewers, program participants, and staff.

In order to address the identified needs and to help accomplish a Council goal, HCD staff developed a team of key, interdepartmental stakeholders to assist with the grant management software selection process, including from City Manager's Office, Information Technology, Finance, Planning, and Legal.

ANALYSIS

Due to a prior expedited timeframe (stemming from the requirements of an Information Systems course in the MBA program for HCD staff member), HCD staff thoroughly researched and implemented best practices, following the below process:

1. Developed an in-depth plan utilizing best practices for grant management software
2. Identified project team comprised of key stakeholders
3. Identified documentation to be integrated and managed
4. Prioritized needs via checklist development
5. Prequalified & pre-evaluated software solutions
6. Managed software demonstrations with GMSS participation
7. Interviewed software users
8. Developed comprehensive scoring
9. Scored software candidates

In compliance with small purchase procedures, staff collected three quotes from software vendors: City Data Services (CDS), Neighborly, and ZoomGrants. HCD staff identified prospective software solutions through attending webinars by the U.S. Department of Housing and Urban Development (HUD) and the National Community Development Association (NCDA), which featured Neighborly and ZoomGrants software. Staff attempted to solicit Salesforce as the third candidate; however, as the vendor was ultimately nonresponsive with multiple attempts of contact, staff reached out to CDS and attended a software demonstration on April 28, 2022. Staff prioritized the usage of software by other jurisdictions in Oregon, in order to problem solve future technical issues that may occur, per staff's personal experience. Because CDS is not currently used by any jurisdictions in Oregon, is expensive, would require sufficient time and staff resources to design and implement (without prefabricated solutions available), and was not considered aesthetically-pleasing, staff eliminated CDS early on as a prospective solution.

Staff interviewed software users in Exhibit A. Per interviews, demonstrations, and checklists prioritizing key features, staff developed and compiled comprehensive scoring, utilizing best practices for software selection. Staff recommends Neighborly as the City's grant management software.

Interviewees described Neighborly software as future-oriented, forward-thinking, the wave of the future, "set up in a big picture way," growing and adapting to meet the changing needs of the complex housing and community development grant industry. In addition, Neighborly recently received SOC Type II security clearance, important for protecting PII (personally identifiable information).

In addition to Neighborly's scalability, staff determined the software as a long-term, cost-efficient investment. While Neighborly's startup costs for the first year (including annual costs) would cost \$15,200 for 3 users and \$7,200 annually, ZoomGrants would cost \$11,500 for 3 applications (with likelihood of increases needed) and \$11,000 annually. Due to the cost savings per year from

Neighborly, the City would save \$3,800+ annually, breaking even in about 1 year when comparing to ZoomGrants.

TIMING ISSUES

HCD staff would like to greatly thank the GMSS for their participation and time during the grant management software selection process.

As a result of extensive research and analysis, HCD staff also requests approval on Monday, November 21, 2022, in preparation for contract execution on or before December 1, 2022, in order to avoid one-time cost increases before January 1, 2023.

EXHIBITS

Exhibit A – Interviews with Software Users

Exhibit B – Cost Analysis

EXHIBIT A

INTERVIEWS WITH SOFTWARE USERS

Software	Date	Contact
ZoomGrants	1/21/22 at 11 A.M.	Mandy Gawf, Community Services Coordinator, City of Hillsboro
ZoomGrants	1/31/22 at 4 P.M.	Omar Martinez, Community Development Program Coordinator, City of Hillsboro
ZoomGrants	2/4/22 at 2 P.M.	Kathy Anderson Peoples, CDBG Project Coordinator, City of Beaverton
Neighborly	2/4/22 at 11 A.M.	Racheal Baker, City of Bend, Affordable Housing Manager
Neighborly & ZoomGrants	2/10/22 at 2 P.M.	Rebecca Royce, Clark County (Washington), CDBG and HOME Coordinator (current employee) Samantha Whitley, City of Vancouver, Community Development Manager (former employee of Clark County – administered transition from ZoomGrants to Neighborly, as previously worked for Clark County for over 20 years)

EXHIBIT B

COST ANALYSIS

	City Data Services*	Neighborly	ZoomGrants
Description	Based on monthly maintenance fee of \$640	Based on number of users per month (estimating 3 users at \$200/month)	Based on number of applications
Licensing	\$640 x 12 months = \$7,680	3 users x (12 months x \$200) = \$7,200/year	\$3,500/year + Annual price per program/application = \$2,500 x 3 = \$7,500
Year One	One-time development fee, \$7,800 \$7,800 + \$7,680 = \$15,480	Software implementation per program (includes training, guides, and data migration) \$2,000 per program Programs: Affordable Housing, Homeowner Repair, Public Service Programs, Public Facilities \$2,000 x 4 = \$8,000 + \$7,200/year = \$15,200	One-time activation fee of \$500 Training included \$3,500 + \$7,500 + \$500 = \$11,500
Year Two – Forward	\$7,680	\$7,200/year (3 users)	\$11,000/year (modified from quote for three applications, per further analysis)

Analysis

* Because CDS is not currently used by any jurisdictions in Oregon, would require sufficient time and staff resources to design and implement (without prefabricated solutions available), is expensive, and not considered aesthetically-pleasing, staff eliminated CDS early on as a prospective solution.

Neighborly start-up costs are \$3,700 more than ZoomGrants. However, Neighborly start-up costs (based on program setup) are one-time fees versus annual for ZoomGrants.

As HCD staff will need at least three applications, annual ZoomGrants fees are estimated at \$11,000 versus Neighborly at \$7,200 (3 users) - \$9,600 (4 users) per year.

Due to the cost savings per year from Neighborly, the City would save \$3,800+ annually, breaking even in about 1 year when comparing to ZoomGrants.
