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Volume I: Factor I: Management and Technical Capabilities

# A screenshot of a video game Description automatically generated with medium confidence1 TEAM REI Overview

REI Systems, Inc. (REI) is a well-established, private, employee-owned company with 700+ employees that provide advanced Information Technology (IT) solutions to address government agencies’ complex, mission-critical challenges. Among its areas of expertise, REI builds solutions that disburse and manage more than $47B in grants each year and generate advanced analytics and data, which are key to making Government more **effective, efficient, and transparent**.

REI has developed and sustained three-decades-long customer relationships with grant-making federal agencies, including the National Aeronautics and Space Administration (NASA), the Department of Justice (DOJ), the Federal Emergency Management Agency (FEMA), and the Health Resources and Services Administration (HRSA). Further, in the last few years, REI’s flagship grants management solution, **GovGrants®**, has served grants management needs for several state and local government entities and leading non-profits, such as the National Endowment for Democracy (NED), Legal Services Corporation (LSC), and National Fish and Wildlife Foundation (NFWF).

For the National and Community Service (AmeriCorps), REI partnered with Stealth Solutions – a longstanding teammate successfully supporting numerous GovGrants implementations. Together, Team REI represents the best team for achieving AmeriCorps’ objectives while also helping AmeriCorps attain its small business requirements.

# 2 Understanding of the Requirement and Ability to Provide Services

Team REI understands that AmeriCorps seeks a vendor who can provide a Commercial-off-the-Shelf (COTS), cloud-based, full lifecycle Grants Management System (GMS). REI fully understands the objectives that AmeriCorps seeks to meet and is 100% confident in meeting these objectives by leveraging our **cloud-based, low-code, Federal Integrated Business Framework (FIBF)-ready, multi-lingual, accessible, role-based, and highly secure grants management platform** – **GovGrants**.

****GovGrants is the end product of Team REI’s experience developing grants management solutions for numerous public sector agencies. GovGrants represents many of the grant best practices and insights Team REI has developed over the past 20+ years. These insights include innovations for system navigation, User Interface (UI) design, ease of use, and business process automation/optimization. Our customers partner with us to ensure both compliance and performance of their grant programs using an intuitive, modern, and scalable system. GovGrants is an enterprise-class, fully modular, highly configurable, and comprehensive GMS. It provides web-based portals for AmeriCorps staff as well as applicants and grantees to manage grants from opportunity announcement through proposal receipt, review, approval, grant award management and oversight, amendments, and grant closeout. What is more, GovGrants offers a number of mechanisms for interfacing with Federal and Agency systems.

Upon reviewing the AmeriCorps high-level functional requirements, Team REI is confident that GovGrants' “As a Grantor” base capabilities can meet most of AmeriCorps’ requirements. Because GovGrants is a configuration-driven grant management platform, the unique requirements of each of AmeriCorps’ various grant programs can be met without wholesale changes to the underlying code while preserving the enterprise grants processes. This flexible product dynamic provides AmeriCorps with a solution that is adaptable in both the short and long term as grants processes, business rules, and regulations change.

On the following page, **Figure 1** shows the complete set of capabilities GovGrants provides to support AmeriCorps’ grants management needs for its staff, peer reviewers, and applicants across the entire grants lifecycle. **Table 1**, on the following page, summarizes our understanding of AmeriCorps’ objectives for its new GMS. **Table 1** also captures Team REI’s relevant capabilities applicable to each AmeriCorps objective.

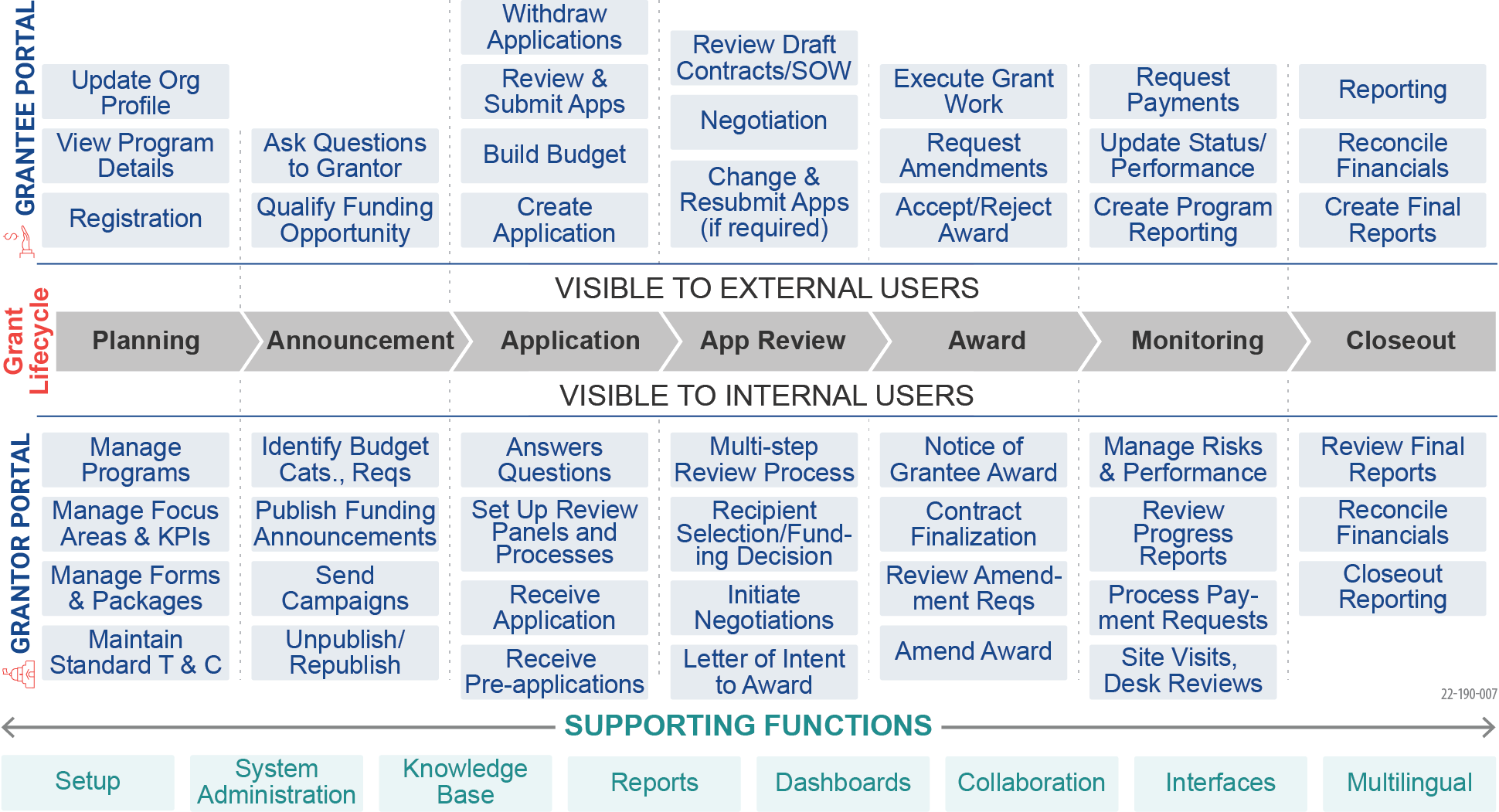


Figure 1: GovGrants offers a comprehensive set of capabilities through an internal and an external portal.

Table 1: Team REI Capabilities that Will Help Meet the AmeriCorps Objectives

| **AmeriCorps Objectives** | **Team REI Capabilities** |
| --- | --- |
| Seeks a multi-lingual solution that allows AmeriCorps to manage the disbursement of grant funding centrally (as a grantor), with the capability to manage opportunity announcement, proposal reception, review, approval, grant award management and oversight, grant amendments, and grant closeout processing. Provide easy reporting and dashboarding capabilities. | GovGrants supports end-to-end grants management capabilities, from grant planning to closeout, to allow AmeriCorps to manage its grant programs using an internal portal for its staff (400 users) and an external portal for grant reviewers (200 users) and grantees (up to 10,000 users). In addition, GovGrants has robust programmatic reporting functionality that Team REI can configure to meet AmeriCorps reporting requirements, including Data Act. Finally, the GovGrants Analytics module supports canned reports using native reporting functionality and dashboards out-of-the-box for all grants management processes, including advanced dashboarding capabilities powered by Salesforce Analytics (Tableau). GovGrants is multi-lingual ready through its integration with ‘Google Translate’ translation capabilities. |
| Cloud-hosted COTS solution that supports the Federal Government standards for system availability and security (FEDRAMP, FISMA, NIST). | GovGrants is a COTS SaaS solution built on the world’s leading cloud platform – Salesforce.com. Salesforce conducts a security review of GovGrants annually to ensure it complies with Salesforce's internal security controls. Team REI will host AmeriCorps’s GovGrants instance on Salesforce’s FedRAMP-certified, NIST-compliant, FISMA-high for the highest performance and data center standards. |
| Supports FIBF and 2 CFR Subtitle A. data element definitions and adheres to accessibility (Section 508) standards. | GovGrants is one of the first COTS-based grant solutions to be FIBF-ready. It supports all FIBF lifecycle functions and activities, including Grant Program Administration, Pre-Award Management, Award and Post-Award Management, Closeout, Program Oversight, and Recipient Oversight, including Audit Resolution. GovGrants also adheres to 2 CFR Subtitle A / the Uniform Grant Guidance (UGG). GovGrants is regularly tested for 508 compliance and supports accessibility standards (VPAT provided herein). |
| Accommodate all data migrated from AmeriCorps legacy grants system, including grant documents. | Team REI designed GovGrants so it can easily host our customer’s past, current, and future grants data. We have supported complex data migrations in GovGrants for several state and local governments and non-profit customers. Team REI uses a robust and proven approach to data and document migration to ensure the past data is migrated successfully and adheres to industry best practices and standards on data governance and data sanctity. |
| Allow interoperability of the GMS with other AmeriCorps systems. Provide a secure and easy integration with external systems for grant information sharing. Support financial integration with Oracle Financial System hosted by Treasury ARC and application intake through grants.gov | Team REI has supported the integration of GovGrants with various external systems in most of its implementations, including both financial and non-financial systems. We have integrated GovGrants with systems such as Oracle’s PeopleSoft and Oracle’s NetSuite. GovGrants currently supports integration with Grants.gov for funding opportunities and application submissions. We have used various integration approaches, including complex API-based two-way integration with or without middleware and simple flat file-based integration to export/import data. |

To meet AmeriCorps objectives, Team REI is committed to providing the best functional and technical Grants Subject Matter Experts (SME) from its GovGrants product and services teams, as well as its deep corporate pool of grants management SMEs, to implement the new GMS. Our grants SMEs are available to engage in the project from Day 1 to support all the tasks listed under PWS Section 4, starting with the gap analysis, Program Increment (PI) planning, backlog management, user experience, Agile development, sprint demos, testing, User Acceptance Testing (UAT), and training.

In summary, Team REI fully understands the importance and functional requirements of AmeriCorps’s mission-critical new GMS. We are ready to meet and exceed all requirements in the PWS using our GovGrants product. We have an established track record of success in the grants domain and the experienced executive, management, functional, and technical staff essential for implementing and rolling out the new AmeriCorps GMS.

# 3 Prior Experience

REI has implemented GovGrants for numerous federal, state, and local government customers and leading non-profits.) Over the course of successfully deploying GovGrants for more than 15 customers, Team REI has built extensive integration experience across numerous software platforms that allow GovGrants to be the de facto system of use for all grants staff members – fiscal staff included – involved in the management of grants. Indeed, most of our grants management systems – across federal, state, and local – have at least one integration point, if not more. Establishing interfaces between disparate software platforms to move data between a grants management system and other governmental systems (e.g., financial, HR, etc.) is a very common use case that we have implemented numerous times.

Interoperability with Government Systems

GovGrants has pre-built interfaces for Grants.gov and SAM.gov. It also provides rich APIs to pull data from various ERP / financial systems including SAP, PeopleSoft, CGI Advantage, and Oracle NetSuite.

REI is currently participating in a prototype Grants Management Blockchain project hosted by MITRE to test the hypothesis of leveraging blockchain technology to track financial obligations and payments from federal grantors through grantees and subgrantees for better oversight and monitoring. We are leveraging our FIBF-compliant GovGrants solution to demonstrate this new feature.

Table 2: REI’s Grants System Portfolio Highlights a Sample of Our Experience and Expertise

REI’s grants portfolio consists of widely adopted, highly successful solutions configured and integrated with federal systems.

| State/Agency | System Scope | Key Statistics | Integration & Interoperability |
| --- | --- | --- | --- |
| Washington DC/ Legal Services Corporation | Supports Basic Field Grant Program | * More than $400M in total grant funding * Currently supports more than 130 Grantees across the US * 1000+ users | * NetSuite Integration using REST API * Box.com Integration using REST API * Single Sign On using Okta |
| Washington DC/National Endowment for Democracy | Customized Grant Management System that supports NED’s mission | * Managing $300M+ in grants focusing on democratic organizations and individuals throughout the globe in approx. 90 countries. * 185 internal users, 3000 external users. | * SAM.gov Integration using REST API * SOAP API with Microsoft Serenic (Future) |
| Utah/State Board of Education (USBE) | Supports the entire portfolio of state and federally funded educational grants for Utah | * 300 active programs, including Minimum School Programs * Over 10,000 annual awards * Over $4B annual grant money * 1500+ current users | * Mulesoft Integration using REST API (CGI FINET Financial System) * Award Data integration using AWS Lambda service |
| California/Los Angeles Homeless Services Authority (LAHSA) | Enterprise grants management solution to manage federal, state, county, and city funds | * Managing $800 million for 200-250 agencies * 100 internal users, 920 external users | * SAM.gov Integration using REST API * AWS/Abila MIP Integration using REST API |
| Washington DC/National Fish & Wildlife Foundation | Enterprise Grants management system to support both “As a Grantee” and “As a Grantor” functionality | * Managing 1000+ awards received by NFWF * 130 internal users in Phase I | * Sharepoint Integration using REST API * Grants.gov Integration using REST API |

# 4 Technical Demonstration of Capabilities

This section describes our strategy, technical solution, and plan to meet the requirements for each PWS Task specified in the RFP using our COTS, SaaS solution, GovGrants®. The sub-sections below present our elements, processes, and functions to meet the requirements for the tasks specified in the PWS.

**PWS 4.1: Basic Services:** With Team REI’s GovGrants, AmeriCorps will get the desired end state that it seeks to achieve through this PWS. GovGrants is a highly configurable grants management system capable of supporting AmeriCorps staff and its grantees to manage grants from grant planning to closeout – both today and tomorrow. Given that GovGrants is built on the Salesforce platform, Team REI will host AmeriCorps’ instance on the Government Cloud Plus. Team REI will configure and customize it per AmeriCorps grants management requirements. In addition, GovGrants integrates with the required AmeriCorps systems, offers business intelligence capabilities, hosts AmeriCorps existing migrated data, and complies with AmeriCorps regulatory requirements for Section 508, FISMA, NIST, and more.

REI will leverage its experienced grants SMEs to implement the new GMS.

REI’s grant SMEs will demonstrate their deep knowledge of GovGrants and the grants domain and will ask targeted questions to discover ‘As-Is’ AmeriCorps processes, related gaps, and requirements.

**PWS 4.2: Task 1: Project Management:** Our Agile approach to project management includes complete and transparent planning, communication, and metrics-based QA, risk, and continual improvement activities throughout the life of the project. We will collaborate with AmeriCorps to provide a comprehensive project kick-off within ten days from award and get clear consensus and agreements on the high-level project plan. The Team REI PM will share the draft Agile Development Management Plan (ADMP) and Quality Control Plan (QCP) with AmeriCorps PM and COR for review and comments. Within a week of the project kick-off, Team REI grant SMEs will kick-start the gap analysis to allow AmeriCorps staff to gain insight into GovGrants capabilities, discuss gaps between the AmeriCorps grants process and GovGrants base capabilities and recommend features that increase staff productivity and meet AmeriCorps’s business needs.

Team REI will document all the AmeriCorps-specific gaps in a product backlog and adjudicate the resolution and priority of the identified gaps with AmeriCorps project leadership before commencing PWS 4.3 (Task 2), Solution Configuration/Build. Upon completion of the gap analysis, we will finalize the updated project baseline by conducting an Integrated Baseline Review (IBR) with AmeriCorps to ensure an explicit agreement on the estimated cost, project scope, and high-level timelines to complete the full GMS roll-out by August 2024. Upon IBR completion, our PM will collaborate closely with the AmeriCorps PM and COR to finalize a detailed schedule by release, an updated/final ADMP, and a QCP. The ADMP will outline our approach toward project management and Agile development, project governance, change management, risk management, quality assurance, personnel and resource management, communications plan, key stakeholders, and more. The QCP will include our approach to identifying, preventing, and ensuring the non-recurrence of defective services and deliverables.

We will leverage REI’s Agile Delivery Framework (RADF) to monitor the team’s performance, identify and apply action items to mature the team’s productivity levels, and make any changes to the team only after inputs from AmeriCorps). We will collaborate with AmeriCorps throughout the execution to revise project plans, prioritize project backlog, resolve defects, develop enhancements, apply user-centered design, refactor code, plan program increments, integrate and design, configuration management, testing, demonstrations, cybersecurity, training, and more. We are committed to supporting discussions and activities that help AmeriCorps refine its enterprise-level strategy and planning for the GMS. If necessary, we will reach back to our corporate resources to engage enterprise and solution architects and other resources to support AmeriCorps architectural and solution engineering and management, business systems compliance, and management.

**PWS 4.3: Task 2: Solution Configuration/Build:** To initiate the GovGrants configuration process for AmeriCorps, we will set up sandbox environments (DEV, QA) for AmeriCorps-specific development with AmeriCorps branding requirements (logos, color schemes, etc.). We will install and host GovGrants for AmeriCorps in the Salesforce Government Cloud Plus, where we will develop, test, build, and stage GovGrants before making it available for production use. Salesforce, a leading cloud-based SaaS solution, is highly scalable, offers high-performing environments, and provides world-class disaster recovery plans and procedures for its 100,000+ customers. We will collaborate with AmeriCorps to obtain an Authority to Operate (ATO) before the system go-live.

GovGrants is a pioneer in FIBF compliance and supports all FIBF data elements and workflows. Other than the FIBF standard data elements and workflows, REI will configure AmeriCorps-specific data elements and workflows for various user roles, such as AmeriCorps grantor staff, AmeriCorps admin and reporting staff, applicants, existing grantees, and external peer reviewers. In addition, Team REI will partner with AmeriCorps-provided translation services and linguistic support staff to understand multi-lingual requirements, including English, Spanish, and other necessary languages. We will implement these requirements in GovGrants by integrating ‘Google Translate’ translation capabilities.

**PWS 4.4: Task 3: Software Development:** Team REI will use our well-proven ADF, described in **Section 5**, to deliver a high-value, high-quality GMS for AmeriCorps. We begin by providing a Software Development Plan (SDP) as part of our ADMP. Next, we work with the AmeriCorps Product Owner(PO) and Team REI’s PO to develop a Program Increment roadmap to meet the GMS vision and revisit it in the Program Increment planning events. Throughout the development process, we maintain a backlog of functional and non-functional requirements, new features, enhancements, and defects in our Team Foundation Server (TFS) and continuously prioritize them with AmeriCorps stakeholders. The non-functional items will include performance improvements, technical upgrades, security updates, defects, accessibility improvements, and more. Team REI will continuously engage with the AmeriCorps PO to prioritize the backlog items throughout the project execution per the established Agile cadence.

Team REI will deliver the GMS using multiple releases over two years, as described in **Table 3, Section 6**. We will use planned quadrimester Iterations (i.e., a release every four months) to configure and customize GovGrants and demonstrate the completed system functionality to AmeriCorps at the end of each iteration. In addition, to ensure continuous improvement of the overall development process that helps improve product quality, Team REI Scrum Master (SM) will conduct a retrospective after each iteration to identify and implement improvement action items. Finally, to support accelerated resolution of critical backlog items, production defects, and other high-priority Information Support Requests (ISRs) while maintaining a balance with developing new requirements, we use multiple Agile teams working in parallel following different Agile methods methodologies such as Scrum and Kanban.

**PWS 4.5: Task 4: Documentation:** Team REI will provide AmeriCorps with all functional and technical documentation available for GovGrants upon project kick-off. In addition, Team REI will develop additional documentation requested by AmeriCorps in the RFP and upload them to AmeriCorps Confluence. Our SM will work with the Agile team to identify the ‘*Definition of Done’* for each iteration and each release, which includes updates to all system documentation for design and functional specifications, test scripts, and more. In addition, our internal Quality Assurance auditors will conduct random inspections to ensure that the development team updates documents per the defined procedures. Team REI PM will manage project risks per our Risk Management approach described in **Section 7** and add, update, and remove risks from the risk register only after approval from AmeriCorps PO.

**PWS 4.6: Task 5: Innovation and Planning Iteration:** Team REI will collaborate with AmeriCorps to lead the Innovation and Planning (IP) iteration through well-designed workshops that include PI planning, Inspect and Adapt (I&A) workshop, and discussion on other items such as technological and architectural changes, learning, issues, and roadblocks. As we complete each Program Increment, we will produce the updated system documentation, provide updated test scripts, demonstrate completed capabilities, and deploy updates to an integrated testing environment for AmeriCorps staff testing. In addition, Team REI will update critical documents, such as Software User Manual, for each release.

To support accelerated Releases on Demand for high-priority items such as system defects, new regulatory compliance requirements, security patches, and more, Team REI will set up an Agile Kanban team to develop, test, demonstrate, and deploy such items for Government testing. Then, once the Government approves, we deploy the items in production. We use our robust automated testing framework, configuration management tools, and Continuous Integration/Continuous Deployment (CI/CD) practices to support the on-demand deployment of all or only a subset of items in production per the Government's approval. Team REI will prioritize low-priority items for subsequent, upcoming PIs.

**PWS 4.7: Task 6: Agile Metrics:** REI’s ADF recommends a series of Agile metrics that help the project team provide insight in the areas of 1) Team Productivity and Performance; 2) Product Quality; 3) Backlog Progress; and 4) Security and Regulatory (e.g., Section 508) Compliance. Team REI acknowledges the metrics proposed in PWS 4.7 (Task) and will present AmeriCorps with the initial set of proposed metrics upon kick-off and finalize and document them as part of our ADMP. Further, during the PI planning events, we discuss with AmeriCorps to adjust metrics after accounting for any learning from recent retrospectives.

Team REI will ensure that the code delivered for each release is complete and accurate per the approved ADMP. We use our code scanning tools to scan code for vulnerabilities and remediate the identified findings per a Plan of Action & Milestones (POA&Ms) approved by the GMS Integrated Product Team (IPT) for all GMS environments. Finally, we deploy the code in production only after AmeriCorps evaluation and confirmation that the security and compliance guidelines are met.

**PWS 4.8: Task 7: Testing:** REI has built the GovGrants product using an integrated quality approach to define quality standards, measure quality, and continuously improve quality. REI used the internal process standards and controls, which follow ISO 9001:2008 and Software Engineering Institute’s Capability Maturity Model Integration (CMMI) Development Level 3 processes, standards, and best practices for software development methodology and Agile Developmental Test (ADT). We apply these same practices and procedures when configuring, customizing, testing, and deploying GovGrants for a customer.

To meet AmeriCorps system quality standards, our Test Manager will prepare and share an Agile Test Strategy that contains a comprehensive Agile Test Plan describing our overall test methodology and approach. We will perform diverse types of testing, including Unit, Functional, Data Management, Data Migration, Performance/ Load, Accessibility, Security, Integration, and Regression. Team REI uses Microsoft TFS as the repository to document user stories and write test cases to test each acceptance criterion within the stories. We also manage the test case execution through TFS and store all test results in TFS. Further, Team REI’s Test Manager (TM) will leverage our automation engineers to automate the manual test cases for AmeriCorps-specific configurations and customizations. We use our proprietary Behavior Driven Development (BDD) Test Automation Framework (TAF) built on the latest technologies (Java, DI, Cucumber, Selenium, Appium, Docker, etc.) and advanced design patterns. Our TAF includes test coverage and built-in test steps for various base functionalities offered in the GovGrants product. In addition, Team REI will leverage existing and newly written automation tests to perform regression testing of the base functionalities and AmeriCorps-specific configurations and customizations.

Team REI will provide AmeriCorps with the Agile Test Description and Agile Test Report from our TFS to share our internal testing scripts with test results after each iteration. We provide a demonstration of system capabilities (functional and non-functional) implemented after each iteration and a more comprehensive demonstration during I&A PI events. To support testing by the Government-appointed Integrated Testing Team (ITT) and Test Integrated Product Team(s) (TIPT), we will provide a set of test scripts that the ITT can use to test critical business scenarios. In addition, we will set up a test environment with essential data for ITT and provide user accounts for various user roles participating in ITT.

Finally, to ensure effective collaboration between Team REI and ITT, Team REI will communicate the testing procedures with ITT, including the mechanism for reporting issues and comments, seeking testing support from Team REI, and any timelines for completing the testing of a set of capabilities. Upon confirmation from GMS ITT to deploy capabilities into production, we will facilitate the code deployment into production and provide the necessary resources (developers, test engineers, and security experts) for Government-led Operational Test & Evaluation (OT&E) and ensure timely resolution of any Government-identified issues.

**PWS 4.9: Task 8: Environmental Management Access:** Team REI follows industry best practices to set up and manage different Salesforce environments necessary to implement and operate the GMS. As part of the implementation, the team sets up DEV, QA, UAT, and Production environments. In addition, Team REI includes system and database admin staff required to maintain the environments to support the continuity of operations. The team documents all the necessary steps and configurations required to deploy and maintain GMS in different environments. This document is updated whenever there is any change to the base configuration.

The Salesforce platform manages the patching, upgrades, and security of the infrastructure, whereas Team REI supports the testing and application of any fixes required to GMS post upgrades from Salesforce. Team REI works with Government IT to set up the necessary domains, DNS entry, SSL certificates, Single-Sign-On (SSO), and multifactor authentication. We also work with the Government IT Security team to complete the ATO documentation and supports the security audit before the system go-live. The team addresses any application-related audit findings (POAMs).

**PWS 4.10: Task 9: Development:** Team REI has developed a robust, proven, comprehensive data migration approach to support complex data migration needs. Our approach ensures that data is not just migrated successfully to the new GMS but also adheres to industry standards for data import and export to ensure data governance and data sanctity. Further, GovGrants provides multiple mechanisms to receive and send data to other external systems. Please refer to **Volume 3,** which describes our data migration strategy, approach, and integration abilities in detail. Also, please see our response within this section (**Section 4**), under “**PWS 4.8: Task 7: Testing,**” where we have provided our approach for test automation and system demonstrations. Team REI will work with AmeriCorps to plan and execute the switchover from the current system to the future GMS.

**PWS 4.11: Task 10: Operations and Support:** Team REI staffs a GovGrants Customer Success Team (CST) for GMS Service Desk Support to support our GovGrants customers' post-production. CST works with the customer to help define success measures and tracks and meet them based on a customer success plan. To support AmeriCorps' regular business hours, the GovGrants CST is available weekdays (Monday – Friday) from 7:00 a.m. to 8:00 p.m. EST, except for U.S. Federal Government holidays.

There are broadly three levels of GovGrants support – End User Support (Tier I), Technical Product Support (Tier II), and Platform/SME Support (Tier III). Each support tier has its own set of responsibilities and engagement model. Tier I support is the traditional Helpdesk function that provides first-line support for all internal and external multi-lingual users who need help with GovGrants. Tier II support addresses all product-level issues and defects. The Tier II team is staffed with technical analysts that provide day-to-day system operations support. Tier II monitors system performance and access logs, manages all the GMS environments, conducts data management, resolves product defects, documents the changes deployed to sandboxes and production, creates regular monitoring reports, and updates the operational support documentation. The Tier II team is involved in testing the Continuity of Operations plan annually. Tier III (Platform/SME Support) is the final escalation point to support any complex product-level issues. In addition, Tier III supports any issue related to the underlying Salesforce platform by working closely with the Salesforce Technical Team.

**PWS 4.12: Task 11: Disaster Recovery:** GovGrants is hosted on the Salesforce cloud platform. Salesforce provides world-class disaster recovery plans and procedures for its 100,000+ customers. To ensure business continuity, all data is replicated to disk in near-real time at the designated disaster recovery data centers, backed up at the primary data center, and then cloned at an archive data center. Disaster recovery tests are frequently executed to verify the projected recovery times and the integrity of the data. Backups are performed daily at each data center facility without stopping access to the application. All backup cloning is transmitted over an encrypted network and is retained for 90 days. Team REI will share with AmeriCorps the Disaster Recovery Plan that describes the recovery process and procedure used in case of a disaster. Team REI will develop a Continuity of Operation Plan that will document the information needed to ensure GMS continuity of operation in the event of critical failure. This document will be updated, and the instructions will be tested by the team annually. Team REI will work 24x7 with Salesforce technical team to ensure recovery in a disaster. Additional details can be found here: <https://compliance.salesforce.com/en/disaster-recovery-bcp>

**PWS 4.13: Task 12: Configuration Management:** Team REI leverages best practices from the CMMI Level 3 and ISO 9001:2015 standards to the Configuration Management (CM) process. Our plan defines how each CI task, including Incident, Change, or Release management, is performed. We define accountability for CM with a program RACI chart (Responsible, Accountable, Consulted, and Informed) to effectively perform Product and Configuration Item management. We apply robust CM practices for software documentation and version management to ensure the integrity of system code, document version history, and track software changes. We manage files related to the application and software configuration as part of our deployment process, utilizing tools such as ClickDeploy and GitHub. We store and control test scenarios, cases, scripts and test reports, process documentation, and business artifact deliverables as configuration items in our Document Repository on SharePoint. Our team conducts periodic audits to review CIs to ensure the performance requirements are met and recommend CI enhancements to mature processes. In addition, we document discrepancies and suggest improvements to the development process of the impacted CIs.

**PWS 4.14: Task 13: Document Management Library:** Team REI will store the Code, deliverables, and plans under configuration control, assign a naming standard and version number determined by the project, and store them within a designated location in the project repository in REI’s SharePoint and GitHub, as well as the Government-provided Collaboration tool. Team REI will provide Sharepoint and GitHub repository access to AmeriCorps Stakeholders post-project kick-off. These may include GMS documents created by AmeriCorps or other vendors. In addition, REI will share the Tools User manual at the time of initial release and keep them up to date with each incremental release.

# 5 Agile Approach

Team REI has a strong history of using various Agile methodologies for end-to-end software development. Our customer-centric mindset has allowed us to employ an empathic design approach throughout the design process. Team REI executes the delivery using Scaled Agile Framework to improve efficiencies when working with multiple teams, increase collaboration and coordination of business goals, and align multiple Agile Teams toward the same business vision. We use REI’s Agile Delivery Framework (RADF) tailored to the Scaled Agile methodology for Lean and Agile enterprise software delivery. Agile ceremonies and activities are used to achieve alignment in planning and execution across the entire program.

As depicted below in **Figure 2**: REI’s Agile Delivery Framework, Team REI goes beyond the standard Scaled Agile delivery framework to improve the effectiveness of delivery. The orange circled numbers show how the RADF optimizes how (1) design is incorporated in active development; (2) developers work to meet user story acceptance criteria in each sprint; (3) code is continuously integrated and tested to achieve a 100% working and releasable product; and (4) a feedback loop of product innovation and enhancements is executed with each release to inform the product roadmap priorities. With this approach, the Agile team “develops on cadence,” aligning with quarterly PI Planning ceremonies. The Technical Lead ensures that planned releases are planned and scheduled every four months. Because our development process incorporates comprehensive testing and decoupling of dependencies, application management teams have the flexibility to use our “deliver on-demand” capability to deploy releases in a more Agile manner when required.

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Figure 2: REI’s Agile Delivery Framework

Team REI’s Scrum Master will work with the AmeriCorps PO, Team REI’s PO, and Technical Lead to tailor, customize, and optimize the methodology and its processes to align with AmeriCorps’ unique technology ecosystem and evolving business culture. These customizations include efficiencies in events such as PI Planning, Inspect and Adapt, Scrum of Scrums (SoS), and working group meetings.

It all begins with the Solution Roadmap derived from the Portfolio Backlog. Team REI will propose the most suitable direction for the roadmap and its strategic implications over upcoming PIs. Based on the capabilities, features, and artifacts, Team REI’s Technical Lead will create the Release Plan. As part of the planning discussion, a Program Backlog of Release is created and prioritized by AmeriCorps. Next, Team REIs Agile development team will conduct planning of quadrimester development cycles in a collaborative and unified manner, known as **Program Increment Planning** in Scaled Agile. Typically, PI Planning consists of the top 10 “Features” of the program backlog. PI planning event includes a facilitated large group all-day workshop where all program stakeholders are physically present to collaboratively review and agree on program objectives. **Team REI has frequently hosted these sessions, most recently with the General Services Administration (GSA) during the development of the Integrated Award Environment (IAE) system and the Food and Drug Administration’s SCAIL system development.** We will ensure that all business stakeholders, core team personnel, the AmeriCorps PO, and program leadership stakeholders achieve a clear consensus and understand the program objectives, risks, and dependencies involved in committing Features or Epics for release in the upcoming PI. In collaboration with business stakeholders, a product backlog of user stories for a solution is created. Stories are sized, and business value is assigned for prioritization. Team REI will ensure that a well-defined Acceptance Criteria and Definition of Done is documented and Tasks and Sub-tasks breakdown is done. Sign-off from the AmeriCorps PO is taken for any variations to baseline the software development plan. We ensure that teams leave the PI Planning event with a prepopulated iteration backlog for the upcoming PI. Lastly, configuration management details and metrics are discussed and agreed upon.

At this point, Team REI will begin executing the PI. We use standard, two-week, fixed-length Iterations as a basic building block of Agile development. Agile teams will focus on delivering incremental value in the form of working, tested software. Planning for Iteration will begin by reviewing the PI roadmap to ensure the increment goal supports the PI objectives. During iteration planning, in consultation with PO, the team will pull User Stories to be worked on during the sprint and define acceptance criteria and Definition of Done. The team will then decompose each user story in Tasks and Sub-tasks that will be completed during the Sprint/Iteration. The Agile teams coordinate with each other within the Iteration through the Scrum of Scrums sessions conducted weekly. Each iteration cycle ends with a review for the AmeriCorps PO, where Agile teams will demonstrate a tested increment of value to the PO and other relevant stakeholders and receive feedback on what they’ve produced. Feedback is then fed back into the Product backlog and prioritized for in the current sprint or for future resolution. The team conducts a Sprint Retrospective with a focus on identifying what worked well and what did not work well, and the action items the team commits to improving on the next sprint delivery.

In a nutshell, we work through portfolio Epics and plan Product Increments. We collaborate with the AmeriCorps PO to **refine Epics and User Stories, break down business requirements, define external dependencies** and **collect security control requirements**. We then implement the requirements through Agile sprints. The team engages with various product owners, product managers, and legacy vendor teams to resolve external dependencies, review design approaches, and share experiences. Our detailed SDP will outline the processes, methods, approach, list of activities, schedule, and key roles that will support the iterative development work.

Team REI acknowledges that the product backlog is a dynamic and constantly evolving artifact, and we conduct refinement sessions on an ongoing basis to review, re-prioritize, elaborate, and discuss backlog items.

Team REI primarily uses the Microsoft TFS tool to manage project work activities such as traceability of requirements for the scope of activities, to facilitate collaboration and interactions between stakeholders and project team members, report our Agile team performance metrics, and track issues, risks, and defects

Team REI strongly believes in an informed and data-driven decision-making process. We generate and closely monitor metrics to ensure team productivity, throughput, and WIP limits are in the expected range. Additionally, Feature Progress Report, Program Predictability Measure, Continuous Delivery Pipeline Efficiency, Team Performance Report, and Technical Agility Assessment are key metrics used to provide ongoing insights into the PI. We use weekly status update meetings to brief the PO on project status and KPIs. We are also open to leveraging any specific tools as required and/or preferred by AmeriCorps.

# 6 Logistics and Schedule

Team REI proposes to deploy GovGrants in a **phased, enterprise-first approach**. Based on our understanding of AmeriCorps requirements and the desire to eventually deploy a system that supports all four large and several small grants programs, we anticipate an approximately 22-month project schedule. We anticipate a project kick-off in October 2022, starting with the completion of product walkthrough and gap analysis with all programs within four months of project kick-off, followed by the **deployment of the first release** and completion of ATO formalities **within nine months** of kick-off, and then deployment of **three additional releases once every four months** (quadrimester) before transitioning the system to REI CST in July 2024. We propose the sequence and timelines for releasing the functional capabilities in **Table 3** below. We will implement AmeriCorps standardized business processes, FIBF-compliant data structures, and program-specific requirements for all programs using the proposed four releases. We are open to discussing and modifying the approach through consultation with AmeriCorps stakeholders.

Table 3: REI’s Proposed Milestones to Deliver AmeriCorps GMS Assuming October 2022 Start

| **Milestone** | **Description** | **Timeline** |
| --- | --- | --- |
| Project Kick-off | Project Kick-off meeting with the Stakeholders. | October 2022 |
| Product Walkthrough and Gap Analysis | Cover detailed product walkthrough and mapping of all standardized/enterprise requirements with the base product. | January 2023 |
| Release 1 | Implementation of Pre-Award modules, including Planning, Announcement, Pre-Application Submission & Review, Application Submission & Review. Integration with Login.gov, Grants.gov, and AmeriCorps member and volunteer management portal. Perform data migration. ATO. Initiate Post Production User Support. | June 2023 |
| Release 2 | Implementation of Award Negotiation, Funding Decision Memo, Award Issuance, and prioritized backlog items for Release 1 functionalities. Perform data migration. Post Production User Support. | October 2023 |
| Release 3 | Implementation of Post-Award Amendments, Payments, and prioritized backlog items from previous releases. Integration with Oracle Business Suite and USASpending.gov. Perform data migration if needed. Post Production User Support. | February 2024 |
| Release 4 | Implementation of Post-Award Monitoring (e.g., progress reports, site visits), Closeout, and prioritized backlog items from previous releases. Integration with prioritized external systems. Perform data migration if needed. Post Production User Support. | June 2024 |
| Transition to REI CST | Hand over the system to CST for full Post Production support. | July 2024 |

Team REI’s phased implementation approach is designed to maximize the opportunity for AmeriCorps to achieve value early. While implementing the system using multiple releases, we collaborate closely with AmeriCorps to onboard various programs based on AmeriCorps' priority. We ensure that prioritized items from the backlog are continuously implemented in the proposed four major releases. Between the major releases, we accommodate additional minor releases, if necessary, to accommodate urgent backlog items.

Subject to AmeriCorps consensus, we propose implementing the complete functionality for all programs in four major releases. This will allow sufficient time to ensure the appropriate level of inputs and cross-AmeriCorps data gathering. Release 1 will enable AmeriCorps to start rolling out the system to support the first phases of the grant lifecycle. Programs will be able to create and publish funding announcements, allocate funding, collect applications, and conduct application reviews starting in June 2023. Team REI will perform the first set of legacy data migrations as part of Release 1 and integrate GMS with Login.gov and Grants.gov. While the Release 1 roll-out is occurring, the Agile team will initiate the Release 2 development in parallel to implement the next set of grants management functionalities listed in **Table 3**. Team REI will apply the parallel development approach for the remaining releases to optimize delivery timelines and costs. On the following page, **Figure 3** outlines the proposed timeline and the key milestones occurring within each phase. Team REI has executed the grants management lifecycle-based multiple-release approach for many other customers with great success.

Once Release 1 has gone live, Team REI will provide user onboarding and support services in parallel with the execution of the remaining phases. Once Release 4 is live, we will transition the project to the GovGrants CST to support AmeriCorps users.

Timeline

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Figure 3: Proposed Timeline and the Key Milestones Occurring within Each Phase

# 7 Risk Management

TeamREI draws on extensive experience and lessons learned from supporting implementations of comparable size and complexity to identify, evaluate and mitigate technical, financial, security, and business risks in concert with AmeriCorps stakeholders. Using this approach, Team REI and the AmeriCorps team will better understand and proactively manage risks to ensure a successful roll-out of the new GMS for AmeriCorps.

A key component of the Team REI risk management approach includes the Project Governance Board (PGB). The PGB will be the focal point for managing critical risks and include key project and executive leadership from Team REI and AmeriCorps. While the Team REI and AmeriCorps PMs will manage most risks at the project level, a PGB will provide the PMs from both Team REI and AmeriCorps with an escalation path to make collective decisions around risk mitigation and contingencies. Our risk management approach is presented below in **Figure 4**. Further, a detailed project risk management approach will be included as part of the ADMP.



Figure 4: Team REI’s Risk Management Process ensures successful delivery.

Our risk management methodology is grounded in the belief that each project activity will have some risk associated with timing, resources, stakeholders, and budget. Therefore, our approach focuses on proactively identifying risks, logging them in the risk register, and addressing them continuously. At the start of the project and during execution, our team will seek input from AmeriCorps participants and other stakeholders deemed appropriate by AmeriCorps leadership to identify any risks and mitigation steps.

In Scaled Agile execution, risks are typically identified and updated during iteration planning, backlog refinement, iteration execution, and the iteration retrospective. Team REI will examine all internal and external dependencies to raise project risks early in the development cycle. Team REI’s PM will manage the project risk register in coordination with the AmeriCorps PO. REI will maintain a risk register in AmeriCorps designated repository (SharePoint, Confluence, etc.) that is available to REI and AmeriCorps teams. Any risks added, updated, or removed will first be discussed and approved by the AmeriCorps PO. The PM and PO will meet weekly to discuss newly identified risks, analyze risk probability and impact, and agree on risk mitigation response/contingency plans, along with clear action items for timely follow-up and continuous monitoring.

# 8 Quality Assurance

**Team REI’s focus on quality control centers on building quality checkpoints into the process rather than just reviewing for quality reactively**, resulting in early engagement with customer stakeholders to define what success looks like for every activity (i.e., service) and work product (i.e., technical deliverable). Our Quality Assurance methodology consists of four phases (**Plan,** **Prevent**, **Detect**, and **Improve**), as depicted in **Figure 5** on the next page.

Timeline

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Figure 5: Team REI’s Quality Assurance Methodology reduces risks and improves execution by ensuring quality throughout the project lifecycle.

**The four phases above illustrate that quality is a continuous activity, not a one-time activity.** The phases include **planning** with an emphasis on integrating quality into each project activity, **preventing** by employing best practices throughout the project to avert defects, **detecting** to audit work products and record results, and **improving,** which provides a feedback loop to continuously improve quality. Our QA methodology guides project teams to deliver projects using Team REI-defined process guidelines that support robust project management practices and high-quality development, verification, validation of software, and related documentation. In addition, projects have the flexibility to tailor project processes if necessary.

The Team REI PM follows an established procedure for reporting, escalating, and tracking non-compliance issues. This allows the Team REI PM to resolve the issues before they pose a significant risk. For problems that need additional oversight or facilitation, the PM escalates to REI Executive Management as required. Team REI reporting procedures entail weekly meetings with AmeriCorps COR to review the project schedule, risks, and issues and discuss corrective actions to ensure a satisfactory resolution.

To monitor contract performance, Team REI will develop a Quality Control Plan (QCP) tailored to the PWS to identify and mitigate quality defects throughout the project life cycle. Our QCP guides the monitoring and reporting of tasks and deliverables, which actively oversee the performance and technical measures and provide monthly updates with progress details.

We are committed to meeting and exceeding **the performance requirements** listed in **PWS Technical Exhibit 1** and will develop a QCP based on our experience managing programs of this scope, size, and complexity. We plan to develop and submit QCP to AmeriCorps COR within 30 days of contract award. Following the acceptance of our QCP, leveraging Team REI’s **experience**, **product** (GovGrants), and **processes**, we are confident in establishing a Quality Assurance Program that will ensure acceptable quality levels for all AmeriCorps deliverables.

Volume I: Factor II: Pre-Recorded Demonstrations

Team REI provides our Pre-Recorded Demonstration video of our GovGrants solution at the following link: [https://reisystems972.ac-page.com/americorpsgovgrantsdemo](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Freisystems972.ac-page.com%2Famericorpsgovgrantsdemo&data=05%7C01%7Canne.hurley%40reisystems.com%7C8be4a85bde594c8bd67a08da91dfea83%7C3199644175464120826bdf0c3e239671%7C0%7C0%7C637982688136809610%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=9pIbP5klAQMEPEUSakpFhdgDVIE8nMxegi8UDVI8oRI%3D&reserved=0).

We are confident that GovGrants is the ideal solution to fulfill the requirements and objectives AmeriCorps has for its Grants Management System.