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Addendum #1

RFP #WRESA-37-2025-2026-03
Grant Management Database

Revisions to the RFP

Proposal Due Date: June 13, 2025, changed to **PROPOSAL DUE DATE: JUNE 27, 2025**

Questions and Answers

Q.1. Are you seeking a custom-built platform for the Grant Management system, or are you looking for an existing off-the-shelf product? - Our company specializes in custom software development, and we've developed similar systems for financial compliance as well as a grant/innovation platform for MIT.
A.1. As this is a new experience, we are looking for an off the shelf and configurable solution tool that best fits the scope of work provided.

Q.2. What was the annual spend for the previous year on this Project?
A.2. This is a new project.

Q.3. If this is a new Contract, what is the annual Budget for this?
A.3. This information is not currently public.

Q.4. Are you open to a hybrid delivery model with a mix of offshore and onshore resources?
A.4. All technology should reside within the United States. Project staff location is not as important as availability during WRESA normal business hours.

Q.5. Will work be on-site or remote?
A.5. On-site visits are necessary when training providers during implementation.

Q.6. Can you please give us an extension of 1-2 weeks to submit our proposal?
A.6. I'm recommending an additional 2 weeks.

![Wayne RESA logo] SERVICE LEADERSHIP COLLABORATION EXCELLENCE — CoPro+ The PLUS Makes the Difference — MAC Michigan Association of Counties

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Q.7. What kinds of individual student data are stored and for what reasons? Can you explain how student PII comes into the grants workflow and why this information is collected relative to your grants? To what extent do you need the platform to manage or store student-level Personally Identifiable Information (PII) in accordance with FERPA requirements?
A.7. There are instances where student names may be shared. Transportation reimbursements may be tied to specific student names or family names.
Q.8. What's the total volume ($USD) of grants applied for, awarded, and disbursed by Wayne RESA on an annual basis?
 A.8. Approximately 130 million ($USD) dollars annually, but that is likely to increase.

Q.9. How many staff will access the system?
A.9. About 10 to 15 staff members at a minimum.

Q.10. Do you have a targeted start date and/or go-live date in mind? Is there a compelling event that is driving this date?
A.10. The rollout will begin with one of our seven cohort groups to pilot in 26/27. In January/February 2026, we will begin working with three programs – 1 LEA (school district), 1 PSA (Public School Academy and 1 CBO (Community Based Organization) to test. In April/May 2026, we will inform pilot programs of the database and begin training in the Summer of 2026. August/September 2026 will begin full implementation for pilot programs. All programs will be fully implemented in August/September 2027.

Q.11. How many unique programs are open annually? What are the estimated averages around the number of applications you receive per year?
A.11. For the 26/27 School Year, we have 171 programs. This is an increase of 13 providers when compared to the year before. An estimated average of applications received per year cannot be determined. Many who apply are immediately denied because they do not meet the requirements to become a GSRP program.

Q.12. For each grant type and opportunity, can you explain the RESA grants lifecycle from start to finish and who is involved in each part of the process? Notice of funding opportunity to applicant registration, application intake, application scoring and review, to award and contracting, to payment process, and post-award monitoring?
A.12.
The grants the database will monitor include, but are not limited to: GSRP Main Operations, Strong Beginnings Main Operations, GSRP Transportation, Strong Beginnings Transportation, and GSRP Start Up Funding. If you need more information on these grants, please refer to the Board Highlights on the Wayne RESA website at Highlights and Minutes - Board of Education - About - Wayne RESA. Please see the

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Fiscal Timeline to understand the yearly lifecycle:
https://docs.google.com/spreadsheets/d/1-
rMp8wK1raFdINXI1P9gabMGiqGP0c0D0luvTs2EqyA/edit?usp=sharing
Once GSRP program opportunities are open, letters are sent to eligible providers, and a
notice is available on our website at Great Start Readiness Program (GSRP) - Early
Education - Wayne RESA. More information on GSRP Guidelines and Procedures
Wayne RESA GSRP Administrative Guidelines & Procedures Manual 2024 can be
found on the website under Program Resources -> Governance. See XIII Community
Partnerships in the GSRP Guidelines and Procedures Manual for more information on
the application and award process. Monitoring is overseen by Wayne RESA Early
Childhood Special Programs Administrative and Fiscal Consultants, Wayne RESA
Budget & Fiscal Analysts and Michigan Department of Lifelong Education,
Advancement, and Potential (MiLEAP), Office of Early Childhood Education, Great Start
Readiness Program Fiscal Analysts and Auditors.

Q.13. What is the expected annual expenditure of this program(s)?
A.13. The expected annual expenditures maintained in the Grant Management
Database are $108,000,000 or more.

Q.14. Do you currently use any advanced reporting/analytics software (such as
Tableau, PowerBI, Qlik, etc.)? If yes, do you plan to continue to use this type of
software going forward? If not, is there an interest in pursuing this option?
A.14. Not currently. We are open to considering software options that will best
organize the workflow and increase the productivity of the Early Childhood department
as it grows.

Q.15. Can you please estimate roughly how many grant records would need to be
migrated from the previous systems? Organizations? People? Reports? Documents?
A.15. There may not need to be any significant migration of documents or records.
Currently, we have 160 active providers, and their documentation is kept in Microsoft or
Google files. It may be beneficial to migrate specific documents for historical
comparison within the system, and active providers will need their organizational
information inputted from spreadsheets.

Q.16. What, if any, is your Single Sign-On solution? If so, is it currently used for both
internal users and external grantees? If not, do you have a targeted vendor partner in
mind?

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A.16. We currently support solutions that leverage Microsoft and Google authentication technologies. We expect multi-factor authentication for users with access to financial or personally identifiable information (PII).

Q.17. Which systems must be integrated with our platform at launch? Do they have APIs available for integration?
A.17. We expect to have an integration with our accounting system, SMART. It is an in-house application that will have APIs created for this use case and need to be clarified based on available features.

Q.18. Ideally, in the consolidation of systems, which platforms do you envision continuing to use versus those where you want to consolidate/deprecate/End of Life?
A.18. We envision continuing to use systems that are available in Excel, CSV or PDF formats. We will continue to use our accounting system, SMART.

Q.19. Can the team share any diagrams or organizational structures as they relate to the grant program?
A.19. Wayne RESA has a relatively flat organizational structure. Three departments will be involved in managing the solution initially, Early Childhood, Finance and Technology departments.

Q.20. Has the team mapped all of the critical grant processes for each program? Can you share process maps or workflow diagrams?
A.20. Please see the fiscal timeline above.
Fiscal Action & Review Process (2025–2026)
1. Budget Allocation & Notification
- Step: Notification to Providers
- Action: WCRESA releases planned allocations
- Timing: May 7, 2025
- Responsible Party: WCRESA
2. Contract Submission & Review
- Step: Contract Submission/Addendum
- Action: Providers submit handbooks, calendars, etc.
- Timing: May 15, 2025
- Responsible Party: Providers
3. Budget Submission
- Step: Budget Notification
- Action: Budgets with allocations released
- Timing: May 27, 2025
- Responsible Party: WCRESA

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4. Monthly Recurring Items

- Step: Ledger Submissions
  - Transportation Ledgers: Due monthly
  - Main Operations Ledgers: Due monthly
  - Responsible Party: Providers

FER (Final Expenditure Report) Process
4.1 FER Training

- Event: FER & Carryover Budget Training
  - August 20, 2025 – General Training
  - September 19, 2025 – In-person, Main Building
  - Responsible Party: Admin and Fiscal Consultants

4.2 FER Submissions

- October 15, 2025
  - Main Operations FER
  - Transportation FER
  - Responsible Party: Providers
- January 30, 2026
  - Carryover FER
  - Start-Up/Expansion FER
  - Responsible Party: Providers
- April 30, 2026
  - Final Carryover FERs
  - Responsible Party: Providers
- August 5 & 14, 2026
  - Final Main Ops & Transportation FER due to CCRESA
  - Responsible Party: Providers & WCRESA

Q.21. "Enforce data retention policies with automated archiving based on WRESA practices." - Could you elaborate on the policies and practices for WRESA?
A.21. WRESA policy is to follow the Michigan Public Schools Retention Schedule

Q.22. "Implement secure data destruction procedures for data that is no longer required." - Could you elaborate on the type of destruction procedures that the agencies are looking for?
A.22. Records that exceed the retention schedule should be destroyed with documentation for WRESA to share with auditors.

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Q.23. What information can be provided concerning the minimum requirements for the APIs?

A.23. We expect to have an integration with our accounting system, SMART. It is an in-house application that will have APIs created for this use case and need to be clarified based on available features.

Q.24. How many grant types are managed?

A.24. Currently 5, however that is likely to expand in the future.

Q.25. How are the budgets for each of the grant types managed? Are they broken down into different sub-groupings for areas like operational, capital, or other sub-grant budgets?

A.25. Each budget follows the guidelines for school district budgets as set out by the State of Michigan in the 1022 Appendix – budgets have function codes and object codes for each line item along with a description of the line item allocation. For personnel, staff and contractors must be listed by name along with their job title and job description, with compensation and work hours. All employees must have a wage and benefit amount listed. Function Codes determine the area of the budget where items go, and usually are broken out by Instructional, Instructional Support, Supervision, Fiscal, Building Services, Recruitment, Family Engagement, and Capital Improvements. Each function code is also broken out into sub-function codes by Wayne RESA, so custom line items would be imperative. Function and Object Codes

Q.26. Does WRESA ever need to manage special short-term grant types with specific requirements for award?

A.26. If the system is flexible enough, other teams at WRESA may utilize the system for managing grants as defined by the State of Michigan.

Q.27. Are grants reapplied for and qualified for each year, or is there another term for grant cycles?

A.27. Yearly and perhaps multi-year grants if we can expand to other teams at WRESA.

Q.28. What phases or stages do each grant type's applications go through for workflow tracking?

A.28. See above for the phases and the fiscal timeline for further clarification.

Q.29. What are the required sets of information needed for application submission for a grant?

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A.29. All applicants need to submit a W-9, an application form submission, along with various credentials and licensing documents. Once accepted as an applicant, providers must submit a list of site and classroom locations, staffing plan and credentials, and a site map for their building.

Q.30. Are grants paid all at once, or are they broken into a payment cycle or a deliverables-based payment process?
A.30. Main Operations payments are made in 1/11 increments from October through August. Transportation payments are reimbursement-based. Start-Up payments are made in lump sum payments upon the approval of the provider's budget. Payments are made through Wayne RESA's SMART system.

Q.31. What information is required throughout the grant cycle from providers?
A.31. See above for the phases and the fiscal timeline above. There is regular reporting due from providers regarding expenditures and enrollment tracking. Largely reporting is related to purchasing and payments to staff and contractors.

Q.32. Do providers need to meet certain requirements for certifications, credentials, or insurance, etc., and how is proof of those requirements managed at WRESA?
A.32. Yes, there are specific requirements that providers must maintain related to the implementation of the grant. Wayne RESA collects and reviews those records on a scheduled basis for approval.

Q.33. Are there other activities that are required to be tracked by WRESA during the grant (for example, visits/inspections, reviews, reporting, assessments, etc.)?
A.33. We would like the system to be customizable for various tracking needs.

Q.34. For the 2% administrative fee to CoPro+, is that expected to be included in the vendor's pricing or added after?
A.34. Some vendors choose to include the administrative fee in their prices and other vendors just add the 2% fee to their normal business costs or overhead.

Q.35. What types of notifications are required for staff and/or providers?
A.35. Grantee reminders/notifications for required timely reporting and/or non-compliance.

Q.36. Can conditional approvals be provided for grant applications, or are there other conditional processes that may be required? What types of conditions need to be tracked/managed for these types of approvals?

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A.36. Yes, conditional approvals are an important aspect of the grant application process. Providers generally complete the application and once they are selected, they go through a process to final approval that includes a site visit, record submission and review process, and participate in various training sessions. All of these are prerequisites for final approval and execution of their contract.

Q.37. Are there appeal processes that need to be tracked when a grant application is not approved?
A.37. Yes, for every grant determination made, providers are given the opportunity to appeal the decision for a period of 10 business days.

Q.38. Is there a need to track complaints against providers and/or WRESA?
A.38. Not for this grant. An established process for this currently exists.

Q.39. Are processes required for the termination of grant agreements/contracts?
A.39. Yes. This will be monitored by Wayne RESA staff.

Q.40. What types of financial reporting are required to be provided to funders?
A.40. Providers minimally are responsible for completing a budget, and providing an accurate account of monthly expenses during the grant period, detailed to the degree that Wayne RESA can be assured of the allowability of those expenses under the grant. Providers are also required to submit final expense reports for all grant funds and carryover grant funds for any funding they have received. From time to time, providers are also required to submit various documents to verify their reported expenditures, such as accounting and payroll records and receipts.

Q.41. What types of reports does WRESA require for internal tracking and management?
A.41. Grant funds requested, allocated, disbursed and remaining, Grantee expense breakdown and encumbrance, reporting on aggregate and per student level, support for financial accounting and other unplanned unique and localized data requirements, as requested.

Q.42. Is integration required with any external systems like ERP/financial, provider database, etc.?
A.42. We expect to have an integration with our accounting system, SMART. It is an in-house application that will have APIs created for this use case and need to be clarified based on available features.

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Q.43. Does the new solution need to manage outcomes from providers as a result of the grants, and what types of outcomes would need to be measured?

A.43. We would like the system to be customizable for various tracking needs.

Provider Success Criteria
 1. User Adoption: At least 80% of intended users actively using the system within three months of full rollout.
2. Budget Accuracy: Improved accuracy in budget tracking and reporting, with at least 90% of funds accurately tracked in real-time.
3. Compliance Adherence: Achieve a compliance adherence rate of 95% or higher for grant requirements and documentation.

Q.44. Is WRESA a non-profit?

A.44. Yes, Wayne RESA is a K-12 public school district, specifically an intermediate school district (ISD) under Michigan Law.

Q.45. How many WRESA staff will access/log into the grants management system more than 20 hours a month? How many WRESA staff will access/log into the grants management system less than 20 hours a month? How many users internal to your organization will be logged into the platform for up to 40 hours per month, and how many for more than 40 hours per month?

A.45. We would likely have 10 staff using the system 20+ hours per month, with 2-5 staff at 40+ hours per month

Q.46. How many external users (applicants, reviewers) will access the system concurrently per month?

A.46. About 200 subcontractors, with one login per provider/contractor.

Q.47. What is your planned hosting option (private vs public hosting)?

A.47.   WRESA will consider all hosting options.

Q.48. Do you have a preferred hosting provider, Amazon Web Services or Microsoft Azure?

A.48. We have a growing skillset with using and managing systems in Amazon Web Services and very limited experience with Microsoft Azure.

Q.49. Would Wayne RESA provide resources for ongoing system configuration and administration?

A.49. Yes, WRESA expects to be responsible for ongoing system configuration and administration.

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Q.50. Are project team members required to be based only in the United States, or would it be acceptable for services to be provided from Canada as well?
A.50. Project staff location is not as important as availability during WRESA normal business hours.

Q.51. Please confirm if background checks are required only for staff required to be on-site.
A.51. Yes, background checks are only required for those regularly working onsite at this time.

Q.52. Would exceptions to terms and conditions be acceptable, or would there be a deduction of evaluation points?
A.52. Points would be deducted for redlines contingent upon the difficulty of negotiating with them.

Q.53. Attachment B Specifications and Requirements Section A. Secure:
Is compliance with FedRAMP and NIST a minimum requirement, or would ISO/IEC 27001 SOC 2 Type II Cyber Essentials and ISO 9001 suffice? Will the system store student personal information, and to what extent, given that HIPAA and FERPA compliance may not be applicable?
A.53. WRESA is expecting proposals to describe how the solution complies with any security standards.

Q.54. Attachment B Specifications and Requirements Section B. Usable:
For the requested integrations, could you clarify the level of integration required? Specifically, does this entail real-time data transfer between the Grants Management system and the external system as changes occur, or will it involve batch updates at scheduled intervals where multiple records are grouped and transferred simultaneously?
A.54. We expect to have an integration with our accounting system, SMART. It is an in-house application that will have APIs created for this use case and need to be clarified based on available features.

Q.55. Has the county already seen demos of grant management software?
A.55. No, some team members have seen marketing materials, but no demos.

Q.56. May a vendor provide previous experience that is similar to grants management in scope services, but not exactly a grants management experience?
A.56. Equivalent or similar to is acceptable.

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Q.57. If you have a CMMC Certification Level 1, would that qualify for meeting the security requirements?
A.57. WRESA is expecting proposals to describe how the solution complies with any security standards.

Q.58. Does Wayne RESA have existing relationships with existing cloud service providers such as Amazon, Google, or Microsoft? And if so, what solutions have you seen marketing materials for?
A.58. We have a growing skillset with using and managing systems in Amazon Web Services, very limited experience with Microsoft Azure and no experience using Google Cloud services with the exception of Google Workspace for Education.

Q.59. What are the current issues with your grant management?
A.59. Opportunity to be more formalized at this point because of its size. We are looking to implement additional systems to improve existing processes.

Q.60. Why is the cloud-based solution important? Or are you comfortable with a third party hosting your contract management system and managing it?
A.60. WRESA will consider all hosting options.

Q.61. What resources do you have available to train staff in using the selected system?
A.61. We would like this to be included as part of the selected grant management tool. At inception as well as on an ongoing basis as users change and we expand.

Q.62. If there is no start date, do you have budget approval for the engagement, or is this purely market research?
A.62. The evaluation may result in a recommendation to the WRESA School Board to authorize contract execution. The budget will be considered when scoring all proposals.

Q.63. Is Wayne RESA planning to solicit and award competitive applications from local schools, or is the intent for Wayne RESA to apply for and manage a grant received from an external funder?
A.63. The initial use is for managing sub-grantee applications and grant awards for WRESA received from the state of Michigan through MiLEAP for the Great Start Readiness Program (GSRP) and its associated services. Grant opportunities are made available to various providers, including school districts, but not limited to them.

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Q.64. How many different types of grant budgets and categories need to be managed? Does each have separate qualification criteria for awards, and do they have separate workflow processes for reviewing, approving, and tracking?

A.64. The grants are customized with various workflows, budgets, and ledgers. Furthermore, many grant awards and budgets are subject to amendments throughout the year, resulting in a fluid situation that involves significant changes. Therefore, the selected system needs to be flexible and adaptable to accommodate these dynamics.

Q.65. What types of provider reporting are required to track award grants? What do you ask providers to give back as justification for how they're spending funds?

A.65. Detailed individual-level reporting for grants by provider, function, and line is essential. It should be as comprehensive as possible and ideally customizable.

Q.66. Can you confirm which specific modules in Attachment B (Secure, Usable, Trustworthy) are "must-have" versus "nice-to-have"?

A.66. We are looking for solutions that best fit our vision for managing grants. All available features will be considered when evaluating proposals.

Q.67. Will there be distinct user-role requirements (e.g., financial, compliance, program staff) beyond the standard roles outlined in the RFP?

A.67. Yes, there would be roles similar to what is noted above – fiscal staff, administrative support staff, supervisory staff, compliance and program support staff, and auditors.

Q.68. Are there specific state/federal security standards we must certify to (e.g., FERPA, CJIS, SOC 2)? What encryption and data retention policies apply to any personally identifiable information?

A.68. WRESA is expecting proposals to describe how the solution complies with any security standards.

Q.69. Can you provide any preferred go-live dates or key milestones (beyond the 3-year base term)? Will Wayne RESA provide a project steering committee or subject matter experts (SMEs) for workshops, and at what stages?

A.69. Please see the fiscal timeline for planned training. Anything beyond the fiscal timeline is yet to be planned. The Wayne RESA Early Childhood Special Programs Administrative and Fiscal Consultants will support Grant Management Database training facilitators as needed.

Q.70. What level of end-user training and documentation are you expecting (e.g., train-the-trainer, user manuals, e-learning)?

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A.70. Yes. User training and documentation will include user manuals, e-learning options, and training facilitation. Ongoing support and training is essential. The awardee would be expected to develop a support framework and training resources for users to ensure smooth adoption and operation of the system.

Q.71. What are your desired support SLAs (response/resolution timeframes) and hours (e.g., 24/7, business hours)?
A.71. On-demand technical support should be available in real-time during business hours Monday – Friday, 7 AM – 5 PM EST. The expectation is a dedicated support representative or account manager would be assigned to this project.

Q.72. For high-volume pricing (Section 1.11.2), can you define your expected purchase volume thresholds?
A.72. We do not have forecasted volume. However, proposers are encouraged to provide proposals that may be applied to additional users or additional school districts.

Q.73. How is the 2% CoPro+ administrative fee handled—through quarterly reporting or invoicing?
A.73. The vendor will be contacted by CoPro+/MAC on a quarterly basis for all its self-reported sales (all billings made to an entity whether it be for sales or service) and the 2% will be applied to all sales and services made to entities using the Contract.

Q.74. Will there be a live demo or BAFO phase, and if so, what data/environment should we prepare? Are site visits to reference customers required before award, and what criteria will you use?
A.74. Section 3.9, Optional Tools to Enhance Evaluation Process – explains Wayne RESA may request oral presentations, a BAFO, site visits, etc., but this isn't usually determined until the evaluation process has started. If it is determined to utilize one or more of those optional tools, vendors would be given instructions at that time to prepare, if applicable.

Q.75. Can you confirm whether subcontractor resumes and organizational charts count toward the page limit? Are any addenda or Q&A already issued that we should incorporate?
A.75. Resumes and organizational charts do not count towards the page limit. This is the first Addendum.

Q.76. Will Wayne RESA provide a standard Master Agreement template for review?
A.76. The standard Master Agreement template is referenced in the RFP at the bottom of the Table of Contents page. It can also be found on the Wayne RESA website under

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Administrative Support – Purchasing, RFPs and Approved Contracts – Request for Proposal. See CoPro+ Contract Terms and Conditions.

Q.77. There is a text box marked Proposer Response in Section 1.9 Delivery and Acceptance. Could you please clarify what response is required for this section, as none is indicated?
A.77. Proposers should describe any clarifications or exceptions to the delivery and acceptance for the proposal.

Q.78. Can you please confirm that the Letter of Transmittal and Sections I, II, and III may be submitted as one separate, combined attachment?
A.78. This is acceptable.

Q.79. Are hyperlinks allowed to be used in the Proposal Response Guidelines sections and Attachment B?
A.79. Yes, hyperlinks may be used to link to available resources.

Q.80. Can you please confirm that bidders should use the RFP document (RFP WRESA-37-2025-2026-03 Grant Management Database) to submit our response to the prompts, such as "Please confirm your understanding by checking Yes or No," and the other similar prompts/text boxes found in the document?
A.80. It is preferrable.

Q.81. There is no box for Proposer Response (either Yes/No or text response) - is any response required for Section 1.10 Criminal and Background Check?
A.81. Section 1.10 is a requirement and for information purposes only. It does not require a response.

Q.82. Is there any breakdown/weighting of the 40 points within Attachment B that they can provide?
A.82. No

Q.83. How are the points for pricing determined? Is there a formula, for example, lowest price/your price?
A.83. The evaluation for pricing will depend on the structure of the proposals received.

Q.84. Can you explain how a proposer providing high-volume pricing would be evaluated more favorably? What number of points will be awarded for providing this information?

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A.84. Proposers are encouraged to provide proposals that may be applied to additional users or additional school districts. WRESA may find value in partnering with other school districts to grow the support and feature set of the selected solution.

Q.85. Are joint proposals acceptable? e.g., a combined proposal from both the software vendor and implementation (professional services) partner.
A.85. The proposal should include a total of all costs associated with the project. Wayne RESA will go into contract with one vendor and payment will be made to one vendor and it will be up to that vendor to disseminate funds as necessary.

Q.86. Please define each of the user groups that will be accessing the system (e.g., Leadership, IT, etc.)
A.87.
- Leadership - Deputy Superintendent of Education Services, Assistant Superintendent of Financial Services, IT Director, Early Childhood Directors and Supervisor of Finance.
- Fiscal - Wayne RESA Early Childhood Special Programs Administrative and Fiscal Consultants and the Budget & Fiscal Analyst.
- Program Early Childhood Consultants – Consultants who support program operations.
- Administrative Support – Early Childhood Assistant for Internal Operations and Administrative Assistants.

Q.88. How many constituents will be accessing the self-service portal to apply for grants / view progress / submit deliverables & reporting?
A.88. Initially, 171.

Q.89. What integrations need to be bi-directional? For the homegrown accounting system (SMART) integration, can you be more specific about integration requirements?
A.89. We expect to have an integration with our accounting system, SMART. It is an in-house application that will have APIs created for this use case and need to be clarified based on available features. Bi-directionality will be dependent on the feature set and effectiveness of the solution.

Q.90. Can WRESA give an overview of what grantmaking tools are currently being utilized?
A.90. There are no grantmaking tools in place at WRESA.

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Q.91. Can WRESA give an overview of grant application requirements? (e.g., how many grant applications are there currently? If there is more than one, can there be one application with dynamic logic?)

A.91. Grant requirements are based on the GSRP Implementation Manual. We anticipate approximately 200 grant applications per year, with between 15-30 NEW applicants per year. There is one grant application period per year – the Main Operations grant. If a provider is accepted as a GSRP contractor, they may either automatically qualify for or apply to receive a Start-Up/Expansion grant and/or a Transportation Grant. Those are separate, but can only be accessed by active providers. It would likely be beneficial to use an application with dynamic logic.

Q.92. Can you give an overview of what needs to be tracked for grants? What does deliverables/outcome tracking look like for state/federal requirements?

A.92. Grant applications, awards, spending, amendments, budgets, associated documentation, payments, monitoring status, provider information, due dates, timelines,

Q.93. What are the additional electronic communication requirements for this project? (e.g., email, text message, online chat)

A.93. Email, Jira, chat-based support

Q.94. What department(s) (e.g., Programs, IT, Finance, etc.) will be responsible for upkeep and maintenance of the solution?

A.94. Early Childhood - Wayne RESA Early Childhood Special Programs Administrative and Fiscal Consultants will be responsible for upkeep and maintenance.

Q.95. Will the vendor be allowed to perform the implementation work completely remotely?

A.95. During the implementation phase if training/retraining is necessary, the vendor should be available to accommodate as needed.

Q.96. Will Wayne RESA reject any proposals that do not include all 10 service regions?

A.96. No, proposals will not be rejected if a vendor is unable to service all 10 regions.

Q.97. As other organizations "piggyback" into the contract, what is the expectation for their services and/or data to be separate from Wayne RESA? Is each contract required to be for a separate database?

A.97. This is yet to be determined, but interested in proposals to consider.

Q.98. Can multiple CoPro+ program members join on a single contract to share a database?

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A.98. This depends on structure and scope of proposed solution.

Q.99. HIPAA was given as an example of a required compliance for security standards. Are there examples of PHI or related HIPAA-protected data that are expected in this system?
A.99. There may be school-based Medicaid services provided and documented for reimbursement from Wayne RESA.

Q.100. Does Wayne RESA currently leverage any industry-standard MFA/SSO tools? (e.g., Okta, Entra ID, MiLogin, etc.)
A.100. We currently support solutions that leverage Microsoft and Google authentication technologies. We expect multi-factor authentication for users with access to financial or personally identifiable information (PII). We also use Duo for some multi-factor authentication scenarios.

Q.101. Does WRESA currently leverage or have a preferred e-signature solution? (e.g., DocuSign, Adobe Sign, etc.)
A.101. WRESA's current e-signature solution is AdobeSign and DOMA Sign..

Q.102. Does SMART already offer API or similar standard integration points?
A.102. We expect to have an integration with our accounting system, SMART. It is an in-house application that will have APIs created for this use case and need to be clarified based on available features.

Q.103. Can WRESA share their business rules, workflows, or process diagrams for ensuring alignment with a proposed solution?
A.103. We do not have any of this documented outside of this RFP.

Q.104. What RPO/RTO requirements does WRESA have for DR within a proposed solution?
A.104. The proposed solution should have an RPO of 1 hour or less and a PTO of 24 hours or less.

Q.105. What volume of bulk communication is expected on a weekly/monthly basis?
A.105. At this time, I would anticipate at least 1-2 communications each month to all grant recipients, and likely several notices per week to individual providers, along with general automated reminder and alert messages.

Q.106. What forms of bulk communication are expected for a proposed solution? (e.g., SMS, email, etc.)

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A.107. Email.

Q.108. Does WRESA currently leverage bulk communication tools? (e.g., Twillio, SendGrid, GovDelivery)
A.108. Wayne RESA currently utilizes Edulink InTouch for bulk communication tools.

Q.109. What features/requirements does WRESA desire when building custom reports for data sharing?
A.109. Historical data storage for long term analysis, financial summaries and grantee progress delivered in PDF, CSV or Excel formats

Q.110. Standard support is provided by the product manufacturer. Do you need dedicated manpower support from Clovity, as the cost will be calculated accordingly?
A.110. Platform support is necessary. Wayne RESA expects to see optional features and services to be clearly documented as optional along with the related costs for each option.

Q.111. Do you expect this to be a product offering (COTS), or can it be a solution that we build specifically for WRESA's requirements?
A.111. As this is a new experience, we are looking for a solution that best fits the scope of work provided and do not have a specific expectation.

Q.112. Does the Grant Management Database need to support federal grants, state-level grants, foundation/private grants, or all of the above?
A.112. For the purposes of Wayne RESA Early Childhood the Grant Management Database will support State grants. However, we are interested in understanding support for all available grants.

Q.113. Who are the primary stakeholders collaborating with the vendor, and what are their roles?
A.113.
- Leadership - Deputy Superintendent of Education Services, Assistant Superintendent of Financial Services, IT Director, Early Childhood Directors and Supervisor of Finance.
- Fiscal - Wayne RESA Early Childhood Special Programs Administrative and Fiscal Consultants and the Budget & Fiscal Analyst.
- Program Early Childhood Consultants – Consultants who support program operations.

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- Administrative Support – Early Childhood Assistant for Internal Operations and Administrative Assistants and program accountants and/or bookkeepers, as well as program leadership.

Q.114. Will end users be required to self-build reports, or will this be an admin/IT-only function?
A.114. Programs should have the ability to pull their own individual reports, whereas Wayne RESA should have the ability to pull individual reports as well as customized groups of reports.

Q.115. Do programs function independently, or are there centralized procedures?
A.115. Programs function independently or with support from their central business office.

Q.116. Are grant management business processes documented and standardized across Wayne RESA? Are grant program applications and procedures standardized?
A.116. Currently grant management processes are driven by grantors, legislation and internal fiscal controls.

Q.117. Has an implementation team been identified, or are you looking for a proposed solution to manage the entire process? If yes, what functional areas do they represent?
A.117. The Wayne RESA implementation team will work in collaboration with the project manager of the vendor and their identified support team. Expected WRESA roles will include Early Childhood, Finance and Information Technology staff. Specific titles will depend on the selected solution.

Q.118. Has your organization identified an internal project manager/project management team for this implementation to coordinate with the vendor?
A.118. Yes.

Q.119. Will WRESA require a training instance populated with realistic data to allow learners to practice using a non-production version of the system?
A.119. Using a training account for teaching purposes before implementation is good practice. During training the database should be close to production or a prototype of the working version of the system.

Q.120. If eLearning were considered, are there authoring/LMS tools you prefer to use to enable long-term maintenance by the users?
A.120.   Wayne RESA has access to an instance of Canvas for online courses.

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Q.121. Is there an expectation that every grantee would have a unique portal or that each "database" has a portal that grantees would securely access?
A.121. Each program should have access to only their own program data within the portal and/or database.

Q.122. Can WRESA clarify how expectations may differ between a Customer report builder and a custom report builder?
A.122. A custom report builder allow WRESA staff to create and share reports for other users in the system. "Customer report builder" is a typo that is meant to be "Custom report builder".

Q.123. Are there any planned/expected import/export formats needed related to Attachment B, B-7-F? (Beyond those already expressed as CSV, PDF, and Excel.)
A.123. There are no planned or expected additional formats needed beyond those already expressed.

Q.124. How do you handle collaboration and communication within your team?
A.124. We communicate via Microsoft Teams and email, as well as in-person. We collaborate in-person and via ZOOM. For some departments within Wayne RESA, outside of Early Childhood, we utilize Jira to track support requests, tasks and projects..

Q.125. Do you have any preferred methodologies or practices for project management? (Do you follow a specific project management methodology, such as Agile, Waterfall, or a hybrid approach?)
A.125. Project timelines and trackers work well for the Early Childhood department at Wayne RESA. The organization utilizes Agile for software development and a hybrid approach for most projects.

Q.126. Are there any specific metrics or KPIs that will be used to evaluate the project's success?
A.126. Success Criteria:

1. User Adoption: At least 80% of intended users actively using the system within three months of full rollout.
2. Efficiency Gains: Reduction of administrative tasks by at least 30% as measured by user feedback and time tracking.
3. Budget Accuracy: Improved accuracy in budget tracking and reporting, with at least 90% of funds accurately tracked in real-time.
4. Compliance Adherence: Achieve a compliance adherence rate of 95% or higher for grant requirements and documentation.

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5. Satisfaction Ratings: User satisfaction ratings of 4 out of 5 or higher based on surveys conducted post-implementation.

Q.127. Did WRESA utilize any vendor / SME consultants in defining the sought-after functionality and/or scope of work enumerated in the RFP? If yes, please provide the name of the vendor/consultant.
A.127. No vendor or consultants were used to define the functionality or scope of work enumerated in this RFP.

Q.128. What dollar volume of these grants are pass-through grants to sub-grantees?
A.128. Approximately $125m of $130m will be awarded to sub-grantees this year and may vary from year to year.

Q.129. When do each of the programs' application periods begin in a given fiscal year?
A.129. The application process begins in January/February with new programs and continues until March when existing programs share their plans for the next school year. Leadership and Program Consultants observe, evaluate, and score, providing rationale for decisions made. Final decisions are made and shared by May. Final contracts are signed by August and executed once the Governor signs the State budget and the Deputy Superintendent of Educational Services sign individual program contracts.

Q.130. What version of your financial management system is currently being used? Please provide the current modules that are implemented within the financial management system.
A.130. The financial management system, SMART, is used across the organization to manage Accounts payable,cash receipts, journal entries, encumbrances, budgeting, customized reports, purchase requests, contractor self-invoicing.

Q.131. There are references to minimum insurance requirements. However, they are not apparent in the CoPro+ contract terms and conditions document. Are there minimum requirements? If so, please provide.
A.131.

Commercial General Liability Insurance

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Minimum Limits: **$1,000,000 Per Occurrence**	**Contractor must have their policy endorsed to add: "Wayne Regional Educational Service Agency, and including all elected and appointed officials, all employees and volunteers, all boards, commissions and/or authorities and their board members, employees, and volunteers" as additional insureds.**
Workers' Compensation Insurance	
Minimum Limits: **Applicable laws governing work activities**	
Employers Liability Insurance	
Minimum Limits: **$1,000,000 Each occurrence**	
Automobile Liability Insurance	
Minimum Limits: **$1,000,000 Combined single limit each occurrence**	**Contractor must have their policy endorsed to add: "Wayne Regional Educational Service Agency, and including all elected and appointed officials, all employees and volunteers, all boards, commissions and/or authorities and their board members, employees, and volunteers" as additional insureds.**

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Umbrella or Excess Liability Insurance	
Minimum Limits: **$4,000,000 Each occurrence excess of underlying;** **$4,000,000 Products/Completed operations aggregate excess of underlying**	
Privacy & Security Liability (Cyber Liability) Insurance	
Minimum Limits: **$1,000,000**	

Q.132. Can a contractor request additional T&Cs to protect pre-existing intellectual property?
A.132. Yes.