

AGREEMENT FOR GRANT RESEARCHING AND WRITING SERVICES

This agreement ("Agreement"), dated as of August 15, 2021 ("Effective Date") is by and between the County of Sonoma, a political subdivision of the State of California (hereinafter "County"), and Carahsoft Technology Corp. (hereinafter "Consultant").

R E C I T A L S

WHEREAS, Consultant represents that it is duly qualified and experienced in the preparation of grant locating and management and related services; and

WHEREAS, in the judgment of the Board of Supervisors, it is necessary and desirable to employ the services of Consultant for locating grants that align with Sonoma County's priorities and tracking grant applications and awards.

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual covenants contained herein, the parties hereto agree as follows:

A G R E E M E N T

I. Scope of Services.

1.1 Consultant's Specified Services.

Consultant shall perform the services described in Exhibit "A," attached hereto and incorporated herein by this reference (hereinafter "Scope of Work"), and within the times or by the dates provided for in Exhibit "A" and pursuant to Article 7, Prosecution of Work. In the event of a conflict between the body of this Agreement and Exhibit "A", the provisions in the body of this Agreement shall control.

1.2 Cooperation With County. Consultant shall cooperate with County and County staff in the performance of all work hereunder.

1.3 Performance Standard. Consultant shall perform all work hereunder in a manner consistent with the level of competency and standard of care normally observed by a person practicing in Consultant's profession. County has relied upon the professional ability and training of Consultant as a material inducement to enter into this Agreement. Consultant hereby agrees to provide all services under this Agreement in accordance with generally accepted professional practices and standards of care, as well as the requirements of applicable federal, state and local laws, it being understood that acceptance of Contractor's work by County shall not operate as a waiver or release. If County determines that any of Consultant's work is not in accordance with such level of competency and standard of care, County, in its sole discretion, shall have the right to do any or all of the following: (a) require Consultant to meet with County to review the quality of the work and resolve matters of concern; (b) require Consultant to repeat the work at no additional charge until it is

satisfactory; (c) terminate this Agreement pursuant to the provisions of Article 4; or (d) pursue any and all other remedies at law or in equity.

1.4 Assigned Personnel.

- a. Consultant shall assign only competent personnel to perform work hereunder. In the event that at any time County, in its sole discretion, desires the removal of any person or persons assigned by Consultant to perform work hereunder, Consultant shall remove such person or persons immediately upon receiving written notice from County.
- b. Any and all persons identified in this Agreement or any exhibit hereto as the project manager, project team, or other professional performing work hereunder are deemed by County to be key personnel whose services were a material inducement to County to enter into this Agreement, and without whose services County would not have entered into this Agreement. Consultant shall not remove, replace, substitute, or otherwise change any key personnel without the prior written consent of County. With respect to performance under this Agreement, Consultant shall subcontract with the following key organization to perform the work described in the Scope of Work: eCivis.
- c. In the event that any of Consultant's personnel assigned to perform services under this Agreement become unavailable due to resignation, sickness or other factors outside of Consultant's control, Consultant shall be responsible for timely provision of adequately qualified replacements.

2. Payment.

Consultant shall be paid a lump sum amount of \$34,450.92 annually for the term of this agreement, regardless of the number of hours or length of time necessary for Consultant to complete the services. Consultant shall not be entitled to any additional payment for any expenses incurred in completion of the services.

A breakdown of costs used to derive the lump sum amount, including but not limited to hourly rates, estimated travel expenses and other applicable rates, is specified in Exhibit B, attached hereto and incorporated herein by this reference.

Upon completion of the work, Consultant shall submit its bill[s] for payment in a form approved by County's Auditor and the Head of the County Department receiving the services. The bill[s] shall identify the services completed and the amount charged.

Unless otherwise noted in this Agreement, payments shall be made within the normal course of County business after presentation of an invoice in a form approved by the County for services performed. Payments shall be made only upon the satisfactory completion of the services as determined by the County.

Pursuant to California Revenue and Taxation code (R&TC) Section 18662, the County shall withhold seven percent of the income paid to Consultant for services performed within the State of California under this agreement, for payment and reporting to the California Franchise Tax Board, if Consultant does not qualify as: (1) a corporation with its principal place of business in California, (2) an LLC or Partnership with a permanent place of business in California, (3) a corporation/LLC or Partnership qualified to do business in California by the Secretary of State, or (4) an individual with a permanent residence in the State of California.

If Consultant does not qualify, County requires that a completed and signed Form 587 be provided by the Consultant in order for payments to be made. If Consultant is qualified, then the County requires a completed Form 590. Forms 587 and 590 remain valid for the duration of the Agreement provided there is no material change in facts. By signing either form, the Consultant agrees to promptly notify the County of any changes in the facts. Forms should be sent to the County pursuant to Article 12. To reduce the amount withheld, Consultant has the option to provide County with either a full or partial waiver from the State of California.

3. Term of Agreement. The term of this Agreement shall be from August 15, 2021 to August 15, 2024, unless terminated earlier in accordance with the provisions of Article 4 below.

Notwithstanding the foregoing, County and Consultant may agree to extend the term of the Agreement for two (2) additional one-year periods by executing an amendment to this Agreement. Such extension and amendment shall be approved by the Department Head.

4. Termination.

4.1 Termination Without Cause. Notwithstanding any other provision of this Agreement, at any time and without cause, County shall have the right, in its sole discretion, to terminate this Agreement by giving 5 days written notice to Consultant.

4.2 Termination for Cause. Notwithstanding any other provision of this Agreement, should Consultant fail to perform any of its obligations hereunder, within the time and in the manner herein provided, or otherwise violate any of the terms of this Agreement, County may immediately terminate this Agreement by giving Consultant written notice of such termination, stating the reason for termination.

4.3 Delivery of Work Product and Final Payment Upon Termination.

In the event of termination, Consultant, within 14 days following the date of termination, shall deliver to County all reports, original drawings, graphics, plans, studies, and other data or documents, in whatever form or format, assembled or prepared by Consultant or Consultant's subcontractors, consultants, and other agents in connection with this Agreement and shall submit to County an invoice showing the services performed, hours worked, and copies of receipts for reimbursable expenses up to the date of termination.

4.4 Payment Upon Termination. Upon termination of this Agreement by County, Consultant shall be entitled to receive as full payment for all services satisfactorily rendered and reimbursable expenses properly incurred hereunder, an amount which bears the same ratio to

the total payment specified in the Agreement as the services satisfactorily rendered hereunder by Consultant bear to the total services otherwise required to be performed for such total payment; provided, however, that if services which have been satisfactorily rendered are to be paid on a per-hour or per-day basis, Consultant shall be entitled to receive as full payment an amount equal to the number of hours or days actually worked prior to the termination times the applicable hourly or daily rate; and further provided, however, that if County terminates the Agreement for cause pursuant to Section 4.2, County shall deduct from such amount the amount of damage, if any, sustained by County by virtue of the breach of the Agreement by Consultant.

4.5 Authority to Terminate. The Board of Supervisors has the authority to terminate this Agreement on behalf of the County. In addition, the Purchasing Agent or County Administrator, in consultation with County Counsel, shall have the authority to terminate this Agreement on behalf of the County.

5. Indemnification. Consultant agrees to accept all responsibility for loss or damage to any person or entity, including County, and to indemnify, hold harmless, and release County, its officers, agents, and employees, from and against any actions, claims, damages, liabilities, disabilities, or expenses, that may be asserted by any person or entity, including Consultant, that arise out of, pertain to, or relate to Consultant's or its agents', employees', contractors', subcontractors', or invitees' performance or obligations under this Agreement. Consultant agrees to provide a complete defense for any claim or action brought against County based upon a claim relating to such Consultant's or its agents', employees', contractors', subcontractors', or invitees' performance or obligations under this Agreement. Consultant's obligations under this Section apply whether or not there is concurrent or contributory negligence on County's part, but to the extent required by law, excluding liability due to County's conduct. County shall have the right to select its legal counsel at Consultant's expense, subject to Consultant's approval, which shall not be unreasonably withheld. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for Consultant or its agents under workers' compensation acts, disability benefits acts, or other employee benefit acts.

6. Insurance. With respect to performance of work under this Agreement, Consultant shall maintain and shall require all of its subcontractors, consultants, and other agents to maintain, insurance as described in Exhibit B, which is attached hereto and incorporated herein by this reference.

7. Prosecution of Work. The execution of this Agreement shall constitute Consultant's authority to proceed immediately with the performance of this Agreement. Performance of the services hereunder shall be completed within the time required herein, provided, however, that if the performance is delayed by earthquake, flood, high water, or other Act of God or by strike, lockout, or similar labor disturbances, the time for Consultant's performance of this Agreement shall be extended by a number of days equal to the number of days Consultant has been delayed.

8. Extra or Changed Work. Extra or changed work or other changes to the Agreement may be authorized only by written amendment to this Agreement, signed by both parties. Minor changes, which do not exceed the delegated signature authority of the Department Head and which do not significantly change the scope of work or significantly lengthen time schedules may be executed

by the Department Head in a form approved by County Counsel. The Board of Supervisors must authorize all other extra or changed work. The parties expressly recognize that, pursuant to Sonoma County Code Section 1-11, County personnel are without authorization to order extra or changed work or waive Agreement requirements. Failure of Consultant to secure such written authorization for extra or changed work shall constitute a waiver of any and all right to adjustment in the Agreement price or Agreement time due to such unauthorized work and thereafter Consultant shall be entitled to no compensation whatsoever for the performance of such work. Consultant further expressly waives any and all right or remedy by way of restitution and quantum meruit for any and all extra work performed without such express and prior written authorization of the County.

9. Representations of Consultant.

9.1 Standard of Care. County has relied upon the professional ability and training of Consultant as a material inducement to enter into this Agreement. Consultant hereby agrees that all its work will be performed and that its operations shall be conducted in accordance with generally accepted and applicable professional practices and standards as well as the requirements of applicable federal, state and local laws, it being understood that acceptance of Consultant's work by County shall not operate as a waiver or release.

9.2 Status of Consultant. The parties intend that Consultant, in performing the services specified herein, shall act as an independent contractor and shall control the work and the manner in which it is performed. Consultant is not to be considered an agent or employee of County and is not entitled to participate in any pension plan, worker's compensation plan, insurance, bonus, or similar benefits County provides its employees. In the event County exercises its right to terminate this Agreement pursuant to Article 4, above, Consultant expressly agrees that it shall have no recourse or right of appeal under rules, regulations, ordinances, or laws applicable to employees.

9.3 No Suspension or Debarment. Consultant warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in covered transactions by any federal department or agency. Consultant also warrants that it is not suspended or debarred from receiving federal funds as listed in the List of Parties Excluded from Federal Procurement or Non-procurement Programs issued by the General Services Administration. If the Consultant becomes debarred, consultant has the obligation to inform the County

9.4 Taxes. Consultant agrees to file federal and state tax returns and pay all applicable taxes on amounts paid pursuant to this Agreement and shall be solely liable and responsible to pay such taxes and other obligations, including, but not limited to, state and federal income and FICA taxes. Consultant agrees to indemnify and hold County harmless from any liability which it may incur to the United States or to the State of California as a consequence of Consultant's failure to pay, when due, all such taxes and obligations. In case County is audited for compliance regarding any withholding or other applicable taxes, Consultant agrees to furnish County with proof of payment of taxes on these earnings.

9.5 Records Maintenance. Consultant shall keep and maintain full and complete documentation and accounting records concerning all services performed that are compensable under this Agreement and shall make such documents and records available to County for inspection at any reasonable time. Consultant shall maintain such records for a period of four (4) years following completion of work hereunder.

9.6 Conflict of Interest. Consultant covenants that it presently has no interest and that it will not acquire any interest, direct or indirect, that represents a financial conflict of interest under state law or that would otherwise conflict in any manner or degree with the performance of its services hereunder. Consultant further covenants that in the performance of this Agreement no person having any such interests shall be employed. In addition, if requested to do so by County, Consultant shall complete and file and shall require any other person doing work under this Agreement to complete and file a "Statement of Economic Interest" with County disclosing Consultant's or such other person's financial interests.

9.7 Statutory Compliance/Living Wage Ordinance. Consultant agrees to comply with all applicable federal, state and local laws, regulations, statutes and policies, including but not limited to the County of Sonoma Living Wage Ordinance, applicable to the services provided under this Agreement as they exist now and as they are changed, amended or modified during the term of this Agreement. Without limiting the generality of the foregoing, Consultant expressly acknowledges and agrees that this Agreement is subject to the provisions of Article XXVI of Chapter 2 of the Sonoma County Code, requiring payment of a living wage to covered employees. Noncompliance during the term of the Agreement will be considered a material breach and may result in termination of the Agreement or pursuit of other legal or administrative remedies.

9.8 Nondiscrimination. Without limiting any other provision hereunder, Consultant shall comply with all applicable federal, state, and local laws, rules, and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, pregnancy, disability, sexual orientation or other prohibited basis, including without limitation, the County's Non-Discrimination Policy. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated herein by this reference.

9.9 AIDS Discrimination. Consultant agrees to comply with the provisions of Chapter 19, Article II, of the Sonoma County Code prohibiting discrimination in housing, employment, and services because of AIDS or HIV infection during the term of this Agreement and any extensions of the term.

9.10 Assignment of Rights. Consultant assigns to County all rights throughout the world in perpetuity in the nature of copyright, trademark, patent, right to ideas, in and to all versions of the plans and specifications, if any, now or later prepared by Consultant in connection with this Agreement. Consultant agrees to take such actions as are necessary to protect the rights assigned to County in this Agreement, and to refrain from taking any action which would impair those rights. Consultant's responsibilities under this provision include, but are not limited to, placing proper notice of copyright on all versions of the plans and

specifications as County may direct, and refraining from disclosing any versions of the plans and specifications to any third party without first obtaining written permission of County. Consultant shall not use or permit another to use the plans and specifications in connection with this or any other project without first obtaining written permission of County.

9.11 Ownership and Disclosure of Work Product. All reports, original drawings, graphics, plans, studies, and other data or documents ("documents"), in whatever form or format, assembled or prepared by Consultant or Consultant's subcontractors, consultants, and other agents in connection with this Agreement shall be the property of County. County shall be entitled to immediate possession of such documents upon completion of the work pursuant to this Agreement. Upon expiration or termination of this Agreement, Consultant shall promptly deliver to County all such documents, which have not already been provided to County in such form or format, as County deems appropriate. Such documents shall be and will remain the property of County without restriction or limitation. Consultant may retain copies of the above-described documents but agrees not to disclose or discuss any information gathered, discovered, or generated in any way through this Agreement without the express written permission of County.

9.12 Authority. The undersigned hereby represents and warrants that he or she has authority to execute and deliver this Agreement on behalf of Consultant.

10. Demand for Assurance. Each party to this Agreement undertakes the obligation that the other's expectation of receiving due performance will not be impaired. When reasonable grounds for insecurity arise with respect to the performance of either party, the other may in writing demand adequate assurance of due performance and until such assurance is received may, if commercially reasonable, suspend any performance for which the agreed return has not been received. "Commercially reasonable" includes not only the conduct of a party with respect to performance under this Agreement, but also conduct with respect to other agreements with parties to this Agreement or others. After receipt of a justified demand, failure to provide within a reasonable time, but not exceeding thirty (30) days, such assurance of due performance as is adequate under the circumstances of the particular case is a repudiation of this Agreement. Acceptance of any improper delivery, service, or payment does not prejudice the aggrieved party's right to demand adequate assurance of future performance. Nothing in this Article limits County's right to terminate this Agreement pursuant to Article 4.

11. Assignment and Delegation. Neither party hereto shall assign, delegate, sublet, or transfer any interest in or duty under this Agreement without the prior written consent of the other, and no such transfer shall be of any force or effect whatsoever unless and until the other party shall have so consented.

12. Method and Place of Giving Notice, Submitting Bills and Making Payments. All notices, bills, and payments shall be made in writing and shall be given by personal delivery or by U.S. Mail or courier service. Notices, bills, and payments shall be addressed as follows:

TO: COUNTY:

Jennifer Larocque
Jennifer.Larocque@sonoma-county.org

575 Administration Drive
Suite 104A
Santa Rosa, CA 95403

TO: CONSULTANT:

Mandi Queen
Account Representative
Mandi.Queen@carahsoft.com
11493 Sunset Hills Road, Suite 100
Reston, VA 20190

When a notice, bill or payment is given by a generally recognized overnight courier service, the notice, bill or payment shall be deemed received on the next business day. When a copy of a notice, bill or payment is sent by facsimile or email, the notice, bill or payment shall be deemed received upon transmission as long as (1) the original copy of the notice, bill or payment is promptly deposited in the U.S. mail and postmarked on the date of the facsimile or email (for a payment, on or before the due date), (2) the sender has a written confirmation of the facsimile transmission or email, and (3) the facsimile or email is transmitted before 5 p.m. (recipient's time). In all other instances, notices, bills and payments shall be effective upon receipt by the recipient. Changes may be made in the names and addresses of the person to whom notices are to be given by giving notice pursuant to this paragraph.

13. Miscellaneous Provisions.

13.1 No Waiver of Breach. The waiver by County of any breach of any term or promise contained in this Agreement shall not be deemed to be a waiver of such term or provision or any subsequent breach of the same or any other term or promise contained in this Agreement.

13.2 Construction. To the fullest extent allowed by law, the provisions of this Agreement shall be construed and given effect in a manner that avoids any violation of statute, ordinance, regulation, or law. The parties covenant and agree that in the event that any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired, or invalidated thereby. Consultant and County acknowledge that they have each contributed to the making of this Agreement and that, in the event of a dispute over the interpretation of this Agreement, the language of the Agreement will not be construed against one party in favor of the other. Consultant and County acknowledge that they have each had an adequate opportunity to consult with counsel in the negotiation and preparation of this Agreement.

13.3 Consent. Wherever in this Agreement the consent or approval of one party is required to an act of the other party, such consent or approval shall not be unreasonably withheld or delayed.

13.4 No Third Party Beneficiaries. Nothing contained in this Agreement shall be construed to create and the parties do not intend to create any rights in third parties.

13.5 Applicable Law and Forum. This Agreement shall be construed and interpreted according to the substantive law of California, regardless of the law of conflicts to the contrary in any jurisdiction. Any action to enforce the terms of this Agreement or for the breach thereof shall be brought and tried in Santa Rosa or the forum nearest to the city of Santa Rosa, in the County of Sonoma.

13.6 Captions. The captions in this Agreement are solely for convenience of reference. They are not a part of this Agreement and shall have no effect on its construction or interpretation.

13.7 Merger. This writing is intended both as the final expression of the Agreement between the parties hereto with respect to the included terms and as a complete and exclusive statement of the terms of the Agreement, pursuant to Code of Civil Procedure Section 1856. No modification of this Agreement shall be effective unless and until such modification is evidenced by a writing signed by both parties.

13.8. Survival of Terms. All express representations, waivers, indemnifications, and limitations of liability included in this Agreement will survive its completion or termination for any reason.

13.9 Time of Essence. Time is and shall be of the essence of this Agreement and every provision hereof.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the Effective Date.

CONSULTANT: Carahsoft

By: Kristina Smith

Name: Kristina Smith

Title: Contracts Director

Date: Sep 30, 2021

COUNTY: COUNTY OF SONOMA

CERTIFICATES OF INSURANCE ON
FILE WITH AND APPROVED AS TO
SUBSTANCE FOR COUNTY:

By: Jennifer Larocque

Jennifer Larocque, Administrative Analyst III

Date: Sep 30, 2021

APPROVED AS TO FORM FOR COUNTY:

EXECUTED BY:

By: Sheryl Bratton

Sheryl Bratton, County Administrator

Date: Sep 30, 2021

By: _____

Chair, Board of Supervisors

Date: _____

ATTEST:

Clerk of the Board of
Supervisors

EXHIBIT A: SCOPE OF WORK

Scope of Work

The County currently utilizes eCivis for Grant Locator and Grant Management software. eCivis will build upon what is already available and complete a review of each department. The review will consist of identifying grants that are available that meets the departments specific areas of interest with particular attention to the goals and objectives identified in the County's Five Year Strategic Plan. eCivis will also work with each department to provide refresher training and new hire training.

eCivis will make sure the Grant Developer/Writer knows the software capabilities and will work with them to identify the grants that are most likely to result in a successful application.

The table below describes how eCivis will meet the requirements outlined in the request for proposals, while the following pages identify additional eCivis services that the County will be able to access.

Response to the Statement of Requirements

| Requirement | eCivis Response |
|---|---|
| 1) Conduct informational meetings with the County Administrator's staff and department heads and/or agency directors and departmental staff to determine specific areas of interest with particular attention to the goals and objectives identified in the County's Five Year Strategic Plan. | eCivis will schedule informational meetings with the appropriate County staff to determine specific areas of interest with emphasis on the County's Five Year Strategic Plan. |
| 2) Provide for the proactive, timely and comprehensive supply of information regarding federal, state and private funding opportunities to the County of Sonoma departments and authorized Community Based Organizations (CBO). Provide access and support for County of Sonoma departments and their community-based organization partners in the use of the chosen service. | eCivis hires full time researchers on staff to provide Federal, State, and Foundation opportunities for the County staff and updated daily. This information is available to all grants network users and support is provided by the assigned Customer Success Manager. |
| 3) An ideal service provider or separate provider will evaluate which grants align with the priorities identified in the County's Five-Year Strategic Plan so that the County can prioritize Page 3 of 13 RFP-Standard their applications. Additionally, the provider could produce a preliminary evaluation of which grants are most likely to result in a successful application. | eCivis will work with the County staff to identify grants that align with the County's Five Year Strategic Plan and create search agents for each area of emphasis. Each grant will then be given a confidence score of which grants are most likely to result in a successful application. |
| 4) Directly supply Department-Agency Directors or their designees with a user-friendly system to request system access, and satisfy new access requests within two working days of receipt of request. | eCivis assigns a Customer Success Manager to the County staff to assist each department the ability to add or delete users as needed. |

| | |
|---|---|
| 5) Develop a report assessing each Department's system training needs in order to maximize use of the service and supply specific system training sessions to County users as needed. | eCivis provides unlimited live training for the life of the contract. eCivis also provides online tutorials and how to videos accessible to the County staff. |
| 6) Establish a tracking system of the users' grant seeking activities, and provide user tracking information to assist the County Administrator's Office in the evaluation of the service including number and dollar amount of secured grant funding. Produce quarterly reports with this information to the County Administrator's Office. | eCivis has several canned reports available for this purpose. eCivis also provides a customer report builder that will allow the County to produce a report with any data point within the Grants Network software. |
| 7) Provide for transfer of data in the event that the County terminates its use or wishes to use another contractor/system. Maintain a database of County of Sonoma users' historical information and passwords. In the event that the County of Sonoma wishes to change contractors, it will provide this database to the County and work with the successor service provider to ensure that user files maintained with the subscription are preserved and to ensure a smooth transition | In the event the County terminates its contract with eCivis the Customer Success Team will provide the County a link to download all historical data, attachments, and passwords. |

eCivis Grants Network: Pre-Award Grant Management provides exactly the information you need to find and win grants that can help your state, local and tribal government meet its goals. eCivis is NOT a grants information clearinghouse; we invest tens of thousands of hours of research each year on federal, state, local, and foundation grants to ensure that users save time and find the best grants for their projects. With our proprietary research and grant analysis, users enjoy longer lead times to produce better applications. Our customized search tools allow users to enjoy rapid results across any and all parameters. Rollover summaries reveal the details of a grant without opening it, so users can quickly assess the relevance of grants to their projects. With our automated search agents, updates, and daily/weekly emails, Grants Network: Pre-Award Grant Management does all the heavy lifting for you and enables your organization to become more proactive in grantsmanship. Grants Network: Pre-Award Grant Management provides the following:

Select Features

- Search grant listings by keyword, eligibility, matching requirements, and funding agency.
- Save search criteria and automatically generate email alerts when new data meets search criteria.
- Route grant information to users both within and outside the system.
- Save individual grants with application intention and personalized notes.
- Report usage and grant research activity for any time period by role.
- Review user-saved grants by role.
- Explore a proprietary library of previously funded applications.
- Access on-demand training and personalized support.
- Manage deadlines for application submission
- Collaborate on a joint workspace
- Develop a pre-award budget and performance measures for submittal in your application package
- Establish internal controls for application approval prior to submission

Distilled Content

- View original analyses of grant information, as opposed to a direct copy of or simple link to publicly available information.
- Find all application materials, including notices of funding, application files, guide files, federal and state forms.
- Examine information culled from agency program officers that is not publicly available.
- Obtain monthly federal legislation updates on key legislation affecting local governments.
- Look at specific scoring criteria for grant proposals.
- Review available financial and matching information, including allowable types of in-kind support
- Make use of grant-specific keywords for each grant to enhance searchability, and identify the most relevant grant opportunities.

Happy Customers

eCivis is the most trusted and widely used grant management system by more than 1,000+ state, local and tribal governments.



eCivis Grants Network: Post-Award Management was designed with the end user in mind and follows the typical grants lifecycle, allowing the end user to track grants and projects from inception through grant closure, with minimum data entry at each stage. This allows grants-active organizations the ability to track activities required to manage grants and to provide regular status reports throughout the grants lifecycle with ease. Grants Network: Post-Award Management will help centralize many of the administrative functions currently done in hard copy or through multiple systems. The Financial Systems Integration option will seamlessly automate the transfer of grants data from the your organization's financial system into Grants Network: Post-Award Management, driving down costs and increasing organizational capacity to seek new funding and focus on other critical grant activities.

Project Management

- *Access via the web 24 hours a day, 7 days a week*
- *Build powerful custom reports*
- *Create an unlimited number of projects*
- *Set up project teams with specific permissions for each team member*
- *Select project teams across multiple departments*
- *Align projects to organizational and departmental strategic objectives*
- *Associate projects with departments*
- *Track both original funding and allocation of a funding pool to multiple projects*
- *Support usage by both internal organization staff, as well as give limited access to users outside the organization*

Grants Workflow

- *Supports a traditional grants workflow including application, award, implementation, reporting, close-out and archiving*
- *Integrates grants information from Grants Network: Pre-award, such as due date and matching information*
- *Automates alerts to project team upon material change in grant application or compliance requirements*
- *Automates alerts sent to central management or finance when key milestones are achieved*
- *Collects key financial, performance period, and compliance information*
- *Permits task assignment to project team members*
- *Allows customized task creation and sets reminders*
- *Lets managers schedule and assign all post-award financial and progress reports*
- *Automates alerts to indicate when tasks are not completed*
- *Lets users configure calendar functionality*
- *Validates critical data entered to ensure they are completed correctly*
- *Detects and notifies if multiple departments are evaluating or applying for the same grant program*
- *Configurable to conform to the required grant process flows of the organization*

Outstanding Service

"Honestly, having eCivis for a long period of time and working with the same client associates over the years has really made them feel like family when I call and have a question. Now that is the true sense of customer service and the #1 reason why we continue to use eCivis."

Mary Witkofski, Grants Manager
City of Maricopa, AZ



File Management

- Full support for use with Microsoft® Office documents and all other widely accepted formats
- Create standard shared documents like indirect cost rates at the organizational level
- Upload an unlimited number of documents at each stage of the grants workflow
- Automatically associate documents with grants workflow steps
- Support retrieval of documents at project, departmental, and organizational levels by document category.
- Create detailed document library reports across departments and projects

Task Management

- Create standard repeatable organization and department approval tasks for every grant to ensure compliance with internal controls and establish your approval process and routing
- Create repeatable simple approval tasks, or advanced sequential approval for individuals or groups
- Attach standardized forms and documents to your tasks to help ensure compliance
- See pending and completed tasks for every project
- Set multiple reminders on a single tasks and receive notifications prior to due date
- Create tasks for scheduled performance reports
- Create recurring tasks with advanced weekly or monthly recurring schedules and due dates

Programmatic Performance

- Create strategic organization, department, project and grant goals that align with your organization's major initiatives
- Record multiple programmatic performance metrics for every grant
- Set target values and record performance period progress at regular intervals
- Assign performance metric updates to department staff for transparency
- Upload files and record notes with metrics to stay within programmatic reporting requirements
- View charts of metric progress for performance period outcomes
- Generate rich reports with complete goal and metric data

Efficient & Effective

“One of the things we’ve been looking to do here in the City of Denver is to be a little more efficient and effective in the pursuit of grants. One of the ways to do that is to have the tool eCivis that tells us who is pursuing grants, and what grants are available. Once we’re awarded those grants, the software is a great tool to help us manage and properly report out. It’s a very important tool to keep us orderly, keep us efficient and keep us effective.”

Mayor Michael Hancock
City & County of Denver, CO



EXHIBIT B: LUMP SUM PAYMENT

| Product Family | Revenue Type | Revenue Type | Software Subscription | Total |
|--|---------------------|-------------------------|--|--------------------|
| Grants NetworkTM Grantee | Annual Recurring | Subscription Revenue | <i>Grantee Pre-Award Software Federal and Foundation Only</i> | \$20,250.92 |
| Grants NetworkTM Grantee | Annual Recurring | Subscription Revenue | <i>Grantee Pre-Award Software Add-on: State Grant Research</i> | \$2,400.00 |
| Grants NetworkTM Grantee | Annual Recurring | Subscription Revenue | <i>Grantee Post-Award Software</i> | \$11,800.00 |
| Total Recurring Software Costs | | | | \$34,450.92 |

EXHIBIT C: INSURANCE

With respect to performance of work under this Agreement, Consultant shall maintain and shall require all of its subcontractors, consultants, and other agents to maintain insurance as described below unless such insurance has been expressly waived by the attachment of a *Waiver of Insurance Requirements*. Any requirement for insurance to be maintained after completion of the work shall survive this Agreement.

County reserves the right to review any and all of the required insurance policies and/or endorsements, but has no obligation to do so. Failure to demand evidence of full compliance with the insurance requirements set forth in this Agreement or failure to identify any insurance deficiency shall not relieve Consultant from, nor be construed or deemed a waiver of, its obligation to maintain the required insurance at all times during the performance of this Agreement.

Workers Compensation and Employers Liability Insurance

- a.** Required if Consultant has employees as defined by the Labor Code of the State of California.
- b.** Workers Compensation insurance with statutory limits as required by the Labor Code of the State of California.
- c.** Employers Liability with minimum limits of \$1,000,000 per Accident; \$1,000,000 Disease per employee; \$1,000,000 Disease per policy.
- d.** *Required Evidence of Insurance:* Certificate of Insurance.

If Consultant currently has no employees as defined by the Labor Code of the State of California, Consultant agrees to obtain the above-specified Workers Compensation and Employers Liability insurance should employees be engaged during the term of this Agreement or any extensions of the term.

General Liability Insurance

- a.** Commercial General Liability Insurance on a standard occurrence form, no less broad than Insurance Services Office (ISO) form CG 00 01.
- b.** Minimum Limits: \$1,000,000 per Occurrence; \$2,000,000 General Aggregate; \$2,000,000 Products/Completed Operations Aggregate. The required limits may be provided by a combination of General Liability Insurance and Commercial Excess or Commercial Umbrella Liability Insurance. If Consultant maintains higher limits than the specified minimum limits, County requires and shall be entitled to coverage for the higher limits maintained by Consultant.
- c.** Any deductible or self-insured retention shall be shown on the Certificate of Insurance. If the deductible or self-insured retention exceeds \$25,000 it must be approved in advance by County. Consultant is responsible for any deductible or self-insured retention and shall fund it upon County's written request, regardless of whether Consultant has a claim against the insurance or is named as a party in any action involving the County.
- d.** The County of Sonoma shall be endorsed as additional insureds for liability arising out of operations by or on behalf of the Consultant in the performance of this Agreement.
- e.** The insurance provided to the additional insureds shall be primary to, and non-contributory with, any insurance or self-insurance program maintained by them.
- f.** The policy definition of "insured contract" shall include assumptions of liability arising out of both ongoing operations and the products-completed operations hazard (broad

form contractual liability coverage including the “f” definition of insured contract in ISO form CG 00 01, or equivalent).

- g.** The policy shall cover inter-insured suits between the additional insureds and Consultant and include a “separation of insureds” or “severability” clause which treats each insured separately.
- h.** *Required Evidence of Insurance:*
 - i.** Copy of the additional insured endorsement or policy language granting additional insured status; and
 - ii.** Certificate of Insurance.

Automobile Liability Insurance

- a.** Minimum Limit: \$1,000,000 combined single limit per accident. The required limits may be provided by a combination of Automobile Liability Insurance and Commercial Excess or Commercial Umbrella Liability Insurance.
- b.** Insurance shall cover all owned autos. If Consultant currently owns no autos, Consultant agrees to obtain such insurance should any autos be acquired during the term of this Agreement or any extensions of the term.
- c.** Insurance shall cover hired and non-owned autos.
- d.** *Required Evidence of Insurance:* Certificate of Insurance.

Professional Liability/Errors and Omissions Insurance

- a.** Minimum Limits: \$1,000,000 per claim or per occurrence; \$1,000,000 annual aggregate.
- b.** Any deductible or self-insured retention shall be shown on the Certificate of Insurance. If the deductible or self-insured retention exceeds \$25,000 it must be approved in advance by County.
- c.** If Consultant’s services include: (1) programming, customization, or maintenance of software; or (2) access to individuals’ private, personally identifiable information, the insurance shall cover:
 - i.** Breach of privacy; breach of data; programming errors, failure of work to meet contracted standards, and unauthorized access; and
 - ii.** Claims against Consultant arising from the negligence of Consultant, Consultant’s employees and Consultant’s subcontractors.
- d.** If the insurance is on a Claims-Made basis, the retroactive date shall be no later than the commencement of the work.
- e.** Coverage applicable to the work performed under this Agreement shall be continued for two (2) years after completion of the work. Such continuation coverage may be provided by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement insurance with a retroactive date no later than the commencement of the work under this Agreement.
- f.** *Required Evidence of Insurance:* Certificate of Insurance specifying the limits and the claims-made retroactive date.

Standards for Insurance Companies

Insurers, other than the California State Compensation Insurance Fund, shall have an A.M. Best's rating of at least A:VII.

Documentation

- a.** The Certificate of Insurance must include the following reference: Grant Locating and

- Management, or an equivalent description.
- b.** All required Evidence of Insurance shall be submitted prior to the execution of this Agreement. Consultant agrees to maintain current Evidence of Insurance on file with County for the entire term of this Agreement and any additional periods if specified in Sections 1 – 4 above.
 - c.** The name and address for Additional Insured endorsements and Certificates of Insurance is: The County of Sonoma, County Administrator's Office, 575 Administration Dr #104, Santa Rosa, CA 95403.
 - d.** Required Evidence of Insurance shall be submitted for any renewal or replacement of a policy that already exists, at least ten (10) days before expiration or other termination of the existing policy.
 - e.** Consultant shall provide immediate written notice if: (1) any of the required insurance policies is terminated; (2) the limits of any of the required policies are reduced; or (3) the deductible or self-insured retention is increased.
 - f.** Upon written request, certified copies of required insurance policies must be provided within thirty (30) days.

Policy Obligations

Consultant's indemnity and other obligations shall not be limited by the foregoing insurance requirements.

Material Breach

If Consultant fails to maintain insurance which is required pursuant to this Agreement, it shall be deemed a material breach of this Agreement. County, at its sole option, may terminate this Agreement and obtain damages from Consultant resulting from said breach. Alternatively, County may purchase the required insurance, and without further notice to Consultant, County may deduct from sums due to Consultant any premium costs advanced by County for such insurance. These remedies shall be in addition to any other remedies available to County.












eCivis Grant Locating - contract and exhibits

Final Audit Report

2021-09-30

| | |
|-----------------|---|
| Created: | 2021-09-30 |
| By: | Jennifer Larocque (jennifer.larocque@sonoma-county.org) |
| Status: | Signed |
| Transaction ID: | CBJCHBCAABAAAdPBHIfJcsXmNbRUBwMYDwppdvvMrd6AX |

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