



# AGENDA REPORT


**TO:** Jestin D. Johnson  
City Administrator

**FROM:** Erin Roseman  
Director of Finance

**SUBJECT:** Citywide Grant Management  
Software

**DATE:** January 8, 2024

City Administrator Approval

  
Jestin Johnson (Jan 11, 2024 14:47 PST)

Date: Jan 11, 2024

## **RECOMMENDATION**

**Staff Recommends That The City Council Adopt A Resolution:**

- 1) Awarding A Professional Services Agreement To Streamlink Software Inc. To Provide Citywide Grant Management Software For A Term Of Four Years In An Amount Not To Exceed \$800,000; And**
- 2) Authorizing An Amendment To The Contract To Extend For Two Additional Years In An Amount Not To Exceed \$120,000 For Each Year; And**
- 3) Waiving The Competitive Multiple Step Proposal Solicitation Process, And The Local And Small Local Business Enterprise Program Requirements**

## **EXECUTIVE SUMMARY**

To increase transparency and efficiency with the City's grant management processes, including the management of awards, and timely funding releases to sub-grantees, the Administration recommends the procurement of a grant management software solution. The proposed resolution authorizes the City Administrator to negotiate and execute a professional services agreement with Streamlink Software Inc. to provide Amplifund, an end-to-end grant management software that will increase the City's grant research capabilities, streamline applications, and improve grant management coordination across departments. The intent of this software is to ensure that the City aggressively applies to grants that align with Council priorities, mitigate internal inefficiencies with grant reporting, and provide a one-stop solution to the City's grant management needs with one software option.

## **BACKGROUND / LEGISLATIVE HISTORY**

Oakland Municipal Code section 2.04.160 authorizes the City Administrator to accept and appropriate restricted grants in the amount of \$50,000 or less provided that 1) the grant does not create unbudgeted costs for the City, 2) the grant is for a program or project that has been approved by the Council in the biennial or midcycle budget or by Council legislation during the fiscal year, and 3) the grant proceeds are used in accord with restrictions and/or conditions of

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the donor. Section 2.04.260 requires that the City Administrator present a report annually to the City Council listing the grants accepted and appropriated by the City Administrator.

On January 24, 2017, members of the Finance & Management Committee requested a periodic report on the City's efforts to secure grant funding. The Finance Department provides the Semi-Annual Grants Report to fulfill this request.

On June 17, 2021, the City Council adopted [Resolution No. 88717 C.M.S.](#), which adopted the FY 2021-23 Biennial Budget and Policy Directives. The Budget Policy Directives instruct the City Administration to instill equity in the budgeting process and create a process for making direct community grants for Council consideration and ensure alignment with Council priorities and evaluation for the allocation of future grant resources directly by the Council. On June 30, 2022, the City Council adopted [Resolution No. 89283 C.M.S.](#), which adopted the FY 2022-2023 Midcycle Budget Policy inclusive of a City Council directive to implement the [direct community grant procedural recommendation](#) delivered to the City Council on April 19, 2022. On June 26, 2023, the City Council adopted [Resolution No. 89804 C.M.S.](#), which adopted the FY 2023-2025 Budget Policy inclusive of \$750,000 earmarked for the 2023 Direct Community Grant recipients. On September 19, 2023, the City Council adopted [Resolution No. 89887 C.M.S.](#), awarding the grant agreements to the 2023 Direct Community Grant recipients, fulfilling the budget policy directive.

On June 26, 2023, the Oakland City Council adopted [Resolution No. 89804 C.M.S.](#), establishing the FY 2023-2025 budget legislation (hereinafter "Adopted Budget"). The Adopted Budget included \$400,000 of appropriations in each year of the budget for grant management software and services. The Adopted Budget included a policy directive to hire a Grant Writer to support increased revenue generation and coordinate grant applications across departments.

## **ANALYSIS AND POLICY ALTERNATIVES**

The Fiscal Year (FY) 2023-2025 Adopted Budget includes over \$113 million in grant funding managed by multiple departments such as Housing and Community Development, Human Services, Public Works, Transportation, Police and Fire Departments. The acquisition of a citywide software solution to manage grant applications, funding, awards, and sub-recipients to optimize cross-departmental communications, track applications and awards efficiently, improve reporting, streamline the subrecipient awards and monitor performance measures resourcefully will significantly benefit the City's grant management processes.

Streamlink Software Inc., dba Amplifund, a cloud-based grant management software, manages the grantee and grantor lifecycles. Researching grants is a long and tedious task that requires specialized knowledge from subject matter experts to develop a successful application. The reduced staffing throughout the City significantly limits grant-seeking resources. Currently, departments manage grant applications independently with limited cross-departmental coordination, with tracking primarily via email and spreadsheets. Amplifund provides a centralized database of thousands of grants, enabling users to search, apply, and receive alerts to new funding opportunities. Staff will collaborate cross-departmentally more efficiently to monitor and develop applications such as automatic alerts to critical dates and deadlines or create custom workflows for approvals.

The City has a rich history of supporting local Non-profits. However, managing all the grant applications has become an increasing challenge. Departments currently manage subrecipient grant applications in silos, which doesn't provide a holistic view of the City as a grantor. Amplifund optimizes the subrecipient application process by providing a centralized platform for Non-profits to submit applications. This platform will allow staff to score applications, distribute awards, and track performance measures in one database to increase transparency and compliance with programmatic goals.

The procurement of Amplifund aligns with the City Council's goal of being a responsive, trustworthy government by supporting the City Council directive to support increased revenue generation while significantly increasing staff's abilities to submit grant applications timely and compiling reports utilizing less resources. Amplifund's integration into the City's Oracle Financial System for enhanced reporting will be implemented in the second phase of the project. Oracle is in the process of moving from on-premises to the cloud. Once the system is in the cloud, staff will begin phase II integration of Amplifund, including the enhanced reporting features. Oracle is scheduled to be completed June 2024.

**Waiver of Competitive Multi-step solicitation process for the acquisition of Information Technology systems and the Local Business/Small Local Business Utilization Requirements**

Oakland Municipal Code (OMC) section 2.04.042.B requires the City Administrator to conduct a multi-step solicitation process for the acquisition of any Information Technology systems, software, or hardware, and OMC section 2.04.042.D permits the Council to waive the multiple step solicitation processes upon a finding that it is in the City's best interest to do so.

Staff recommends that, pursuant to OMC Section 2.04.042.D, the City Council finds and determines that it is in the best interests of the City to waive the multi-step proposal solicitation competitive selection requirement for the procurement of Amplifund because this vendor will immediately provide grant seeking access which significantly expands the City's granting research efforts as we enter the next budget cycle. Furthermore, Amplifund's platform can consolidate and streamline the sub-recipient grant application process, and staff intends to pilot the FY 2024-25 Direct Community Grant Program utilizing this software.

Ordinance number [13640](#) and [13647](#) C.M.S. requires a minimum 50-percent (50%) Local Business Enterprise/Small Local Business Enterprise ("LBE/SLBE") participation for all purchase of commodities, goods, and associated services for contracts valued at or over fifty thousand dollars (\$50,000) when there are at least three certified business listed in the industry, trade, or profession that constitutes a major category of work. However, the Council may waive the City's LBE/SLBE requirements due to a lack or limited availability of LSBEs or LBEs and because it is in the best interests of the City to do so.

The Department of Workforce and Employment Standards (DWES) identified and confirmed one local firm with the ability to perform these services. Staff confirmed with the local vendor that they did not have a pre-developed grant management software to perform the services the City requires under this contract. Staff solicited software demonstrations from five additionally identified vendors and is confident in Amplifund's ability to centralize the City's grant management infrastructure swiftly and promptly, allowing for staff to begin grant seeking immediately. Thus, staff requests that the Council waive the LBE/SLBE utilization requirements for this proposed

contract on this basis and because it is in the best interests of the City to do so because of the reasons discussed in this report.

**FISCAL IMPACT**

Adoption of this proposed resolution will authorize the City Administrator to negotiate and execute a professional services agreement with Streamlink Software Inc. to provide a grant management software (Amplifund) in an amount not to exceed eight hundred thousand dollars (\$800,000) for a term of four years beginning February 1, 2024, and ending on February 1, 2028. The proposed resolution also authorizes two (2) one-year options to renew the contract, without returning to council, in an amount not to exceed one hundred twenty thousand dollars (\$120,000) for each year of the contract. The optional renewal contract years are subject to the availability of future funding.

Funding for the proposed contract is available in the Fiscal Year (FY) 2023-2025 Biennial Adopted Budget in the following funding sources:

**Table 1: Funding Sources**

| Fund                   | Org                            | Project               | Account                           | Program                     | FY 2023-2024 | FY 2024-2025 | Total            |
|------------------------|--------------------------------|-----------------------|-----------------------------------|-----------------------------|--------------|--------------|------------------|
| 1010 – General Purpose | 08111 – Finance Administration | 1000007 Admin Project | 54919 – Services: Misc. Contracts | IP59 – Financial Management | \$400,000    | \$400,000    | <b>\$800,000</b> |

**Table 2: Project Estimated Cost Summary Breakdown**

| Product/Service   | 2/1/24-1/31/25 | 2/1/25-1/31/26 | 2/1/26-1/31/27 | 2/1/27-1/31/28 | TOTAL               |
|---|----------------|----------------|----------------|----------------|---------------------|
| One-Time Implementation Package   | \$51,000.00    |                |                |                | \$51,000.00         |
| Amplifund Lifecycle Subscription Fee                                    | \$112,500.00   | \$112,500.00   | \$112,500.00   | \$112,500.00   | \$450,000.00        |
| Data Integration, Contingency, and/or Optional Contract Renewal Reserve | TBD            | TBD            | TBD            | TBD            | \$299,000.00        |
| <b>TOTAL</b>  | \$163,500.00   | \$112,500.00   | \$112,500.00   | \$112,500.00   | <b>\$800,000.00</b> |

**PUBLIC OUTREACH / INTEREST**

This item did not require additional public outreach, other than posting on the City’s website.

**COORDINATION**

This report was prepared by the Finance Department and reviewed by the Budget Bureau, City Administrator and City Attorney’s offices.

## **SUSTAINABLE OPPORTUNITIES**

***Economic:*** The City's Budget represents over \$1 billion in annual expenditures into the local economy. Of the \$1 billion, the FY 2023-2025 budget includes over \$113,000,000 in grant funding, including the City as both Grantee and Grantor. If the City is unable to effectively manage the federal and state grant funding, there will be significant impacts on the local economy and services provided to the residents of Oakland.

***Environmental:*** The City is a major recipient of federal and state grant funding, some of which directly support environmental preservation efforts and mitigate climate impact. This software will allow staff to increase the grant applications that align with environmental preservation, reduce harmful human activities, reduce watershed pollution, and increase sustainability efforts. Should the City receive a reduction in grant funding, it could have a considerable effect on the local environment.

***Race & Equity:*** Oakland is on a mission to build equity intentionally through the integration of the principle of "fair and just". Staff will be piloting the second year of the Direct Community Grant program on this platform. It is the intent of this program, and others like it, such as the cultural arts grant program, to build equity within our historically underserved communities. While an equity analysis for the procurement of this software has not been conducted, the programs utilizing Amplifund will build equity within Oakland.

**ACTION REQUESTED OF THE CITY COUNCIL**

**Staff Recommends That The City Council Adopt A Resolution:**

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For questions regarding this report, please contact Brittany Hines, Assistant to the Director, at (510) 238-7078.

Respectfully submitted,



Erin Roseman (Jan 7, 2024 22:11 PST)

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Erin Roseman  
Director of Finance

Prepared by:  
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Assistant to the Director