



**CITY OF HOUSTON**  
HCD Purchasing Unit 3200

PO NUMBER MUST APPEAR ON ALL PAYMENT AND  
DELIVERY CORRESPONDENCE

# PURCHASE ORDER

**Vendor Address**

Vendor Address Number 135492  
SURVEYMONKEY INC  
101 LYTTON AVE  
PALO ALTO CA 94301  
USA

**Mail Invoice to**

COH HOUSING & COMMUNITY DEV  
FINANCIAL SERVICES SEC, ACCT PAY  
P.O. Box 1562  
HOUSTON TX 77251-1562

**Information**

**Purchase Order Number/Date** 4500338093-0 / 12/08/2020  
**CoH Vendor Number** 135492  
**Page** 1 of 2  
**Buyer's Name** Clarence Moton 454  
**Buyer's Telephone Number** 832-394-6212  
**Buyer's Fax Number**  
**Buyer's E-mail Address** clarence.moton@houstontx.gov

**CONFIRM RECEIPT AND ACCEPTANCE OF PURCHASE ORDER  
TO BUYER'S E-MAIL ADDRESS**

**Shipping Address**

HOUSING & COMMUNITY DEVELOPMENT  
PROCUREMENT SERVICES  
2100 TRAVIS, 9TH FLOOR  
HOUSTON TX 77002  
USA

**Terms of payment :**

Pay net 30 w/o deduction

Currency USD

**Shipping Terms**

FOB(Free on board) /DESTINATION

**Your person responsible:** M COURTNEY

Item	Quantity	UM	Material # / Description	Unit Cost	Extended Cost
10	1.00	AU	91871 IT CONSULTING HEDP Online Application The HCDD Economic Development Division is engaging SurveyMonkey to design and host the virtual platform for the Harvey Economic Development Program's (HEDP) electronic application.  The platform will host applications for the HEDP and allow the HEDP to do reporting necessary to meet its requirements with the GLO and HUD.  Refer to RFQ 6000093247.(11/04/2020)	10,000.00 / AU	10,000.00
Gross Price			10,000.00 USD	1 AU	10,000.00
			Expected value of unplanned services:	10,000.00	
<b>Delivery Date:</b> 01/08/2021					



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HCD Purchasing Unit 3200

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DELIVERY CORRESPONDENCE

# PURCHASE ORDER

PO number/date 4500338093 -0 / 12/08/2020 Page 2 of 2

Total \*\*\*\*

USD 10,000.00

**The Terms and Conditions specified on <http://purchasing.houstontx.gov> will apply.**

I hereby certify a certificate of the necessity of this expenditure is on file in this department.

I hereby certify that the expenditure for the above goods has been duly authorized and appropriated and that sufficient funds are available to liquidate same.

Mayor

Chief Procurement Officer

Controller

**City of Houston  
Bid Tabulation  
for  
Harvey Economic Development Program Online Application**

**I03796 - Close Date: 11/13/2020 3:00:00 PM**

Bids Received: 5																			
Vergar Development Solutions LLC Veronica Ford 713-516-5848 155052					Gerard Diaz Associates CRTC 614-262-6662 136735					Timbergrove Solutions, LLC 281-628-2135 136167			V3Main Technologies Inc. 2813940509 152151						
Item #	Description	Qty	U/M	Unit Price	Months	Period	Note	Mfg	Line Total (for Qty & Period)	Months	Unit Price	Note	Mfg	Line Total (for Qty & Period)	Months	Unit Price	Note	Mfg	Line Total (for Qty & Period)
Harvey Economic Development Program Online Application																			
1	10047087; MODULE ENVIRONMENTAL, SINGLE PHASE; Harvey Economic Development Program Online Application. Please see Scope of Work attached	1	EA	\$23275.00					\$23275.00										
									\$37500.00										
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									\$49000.00										
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**From:** Shah, Pranav - IT  
**To:** Mitchell, Joshua - HCD; Pineda, Paula - HCD; Pate, Orson - IT  
**Subject:** RE: HEDP Online Application Proposal Review  
**Date:** Tuesday, November 17, 2020 3:23:25 PM

---

Josh,

I concur with our assessment. Please consider this message as an approval to proceed further with Survey Monkey. Looking forward to work with you all as a team and in complete collaboration.

Regards,

**Pranav Shah**

IT Manager - Applications

City of Houston

Housing and Community Development Dept.

2100 Travis Street | 9th Floor | Houston TX 77002

832.394.6268 (office)

832.606.6071 (mobile)

[www.houstontx.gov/housing](http://www.houstontx.gov/housing)

[www.recovery.houstontx.gov](http://www.recovery.houstontx.gov)

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**From:** Mitchell, Joshua - HCD <Joshua.Mitchell@houstontx.gov>

**Sent:** Tuesday, November 17, 2020 2:10 PM

**To:** Shah, Pranav - IT <Pranav.Shah@houstontx.gov>; Pineda, Paula - HCD  
<Paula.Pineda@houstontx.gov>; Pate, Orson - IT <Orson.Pate@houstontx.gov>

**Subject:** FW: HEDP Online Application Proposal Review

Dear Pranav,

I hope that this email finds you well.

After a review of the submitted proposals, the ECON Team concurs with Orson's analysis. It is our strong preference to proceed with the selection of SurveyMonkey as our chosen vendor for this solicitation.

How quickly can we move forward with the selection process?

Many thanks to you and your team for your helpful collaboration.

All the best,

Josh Mitchell  
Staff Analyst  
Economic Development

832-394-6200 ext. 46297  
City of Houston  
Housing and Community Development Dept.  
2100 Travis Street | 9th Floor | Houston TX 77002  
[www.houstontx.gov/housing](http://www.houstontx.gov/housing)  
Follow us: [Facebook](#) | [Twitter](#) | [Instagram](#) | [YouTube](#)

**From:** Pate, Orson - IT  
**Sent:** Monday, November 16, 2020 5:19 PM  
**To:** Mitchell, Joshua - HCD <[Joshua.Mitchell@houstontx.gov](mailto:Joshua.Mitchell@houstontx.gov)>; Pineda, Paula - HCD <[Paula.Pineda@houstontx.gov](mailto:Paula.Pineda@houstontx.gov)>  
**Cc:** Shah, Pranav - IT <[Pranav.Shah@houstontx.gov](mailto:Pranav.Shah@houstontx.gov)>  
**Subject:** RE: HEDP Online Application Proposal Review

Joshua,

Please see attached spreadsheet for your use in vendor proposal evaluation. I have provided an initial ranking based upon responses from vendors. Please feel free to use this as a tool for your evaluation purposes. Thanks, Orson.

**From:** Mitchell, Joshua - HCD  
**Sent:** Monday, November 16, 2020 2:51 PM  
**To:** Pineda, Paula - HCD <[Paula.Pineda@houstontx.gov](mailto:Paula.Pineda@houstontx.gov)>; Pate, Orson - IT <[Orson.Pate@houstontx.gov](mailto:Orson.Pate@houstontx.gov)>; Shah, Pranav - IT <[Pranav.Shah@houstontx.gov](mailto:Pranav.Shah@houstontx.gov)>  
**Subject:** HEDP Online Application Proposal Review

Dear Orson,

Many thanks for all of your kind assistance throughout the process. It's been a pleasure working with and learning from you.

To summarize our brief conversation regarding the proposal review:

1. By COB Friday (11/20), Paula and I will provide our recommendation to you and Pranav.
2. By COB Friday (11/20), Pranav and Orson will share their recommendation with ECON.
3. On Monday (11/23), ECON and IT will pass along to procurement the agreed upon solution.

Best regards,

Josh Mitchell  
Staff Analyst  
Economic Development  
832-394-6200 ext. 46297  
City of Houston  
Housing and Community Development Dept.  
2100 Travis Street | 9th Floor | Houston TX 77002  
[www.houstontx.gov/housing](http://www.houstontx.gov/housing)  
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## PROCUREMENT REQUEST FORM



Note: The Procurement Request form is to solicit quotes through an Informal (Small Purchase) bid process for purchasing transactions \$100,000 or less using Federal Funds (2 CFR 200.318) and \$3,000 to 49,000 using non-Federal funds (COH AP 5-8, Executive Order 1.14).  
Signature of this document is still required.  
\* Required Fields [must be completed]

Description of Purchase *	Electronic Application	HCDD Division: *	Disaster Recovery *
Deadline Date of Request: *	11/18/2020	Purchase Type: *	Service Under &lt *
Requester Name: *	Joshua Mitchell	Created:	11/18/2020
Requester Phone Number: *	202-999-6336		

## Brief Description of Scope of Work for Goods/Services:

The HCDD Economic Development Division is engaging SurveyMonkey to design and host the virtual platform for the Harvey Economic Development Program's (HEDP) electronic application.

**Funding Source(s)** ERC-PRJ-19EC11

Note: Please allow a minimum of three (3) days for bid responses.

FINANCE USE ONLY	PROCUREMENT USE ONLY
Fund Number: 5030	Status: Pending
Funding Source: DR-Harvey	Purchase Order No:
Cost Center: 3200030002	Name of Vendor: Survey Monkey
G/L Account: 522430	Date Processed:
Business Area: 3200	Date Received:
Internal Order: BL3200077-19	Total Amount: 10,000
BFY: FY-2021	Procurement Staff:
Grant: 32000077-2019	Priority:
Funds Reservation:	Notify Department: Procurement
Funds Approval Mgr: Mary Owens	Notify Department: Finance

## Justification of Need for Goods/Services

The platform will host applications for the HEDP and allow the HEDP to do reporting necessary to meet its requirements with the GLO and HUD.

## Procurement Notes:

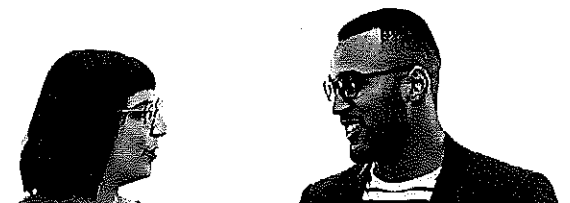
Requestors Signature: Date: 11/19/2020 Joshua Mitchell 1D134A8C0A340E...	Supervising Manager (Purchase under \$5,000) Manager: Date: 11/19/2020 Paula Pineda 0DA87C664E74FF...
Buyer's Signature: Date: 11/19/2020 Charlene Moton 0B72C1A7D4A8340E...	Funds Approval Signature: Date: 11/23/2020 Mary Owens 5F0B33CA4CDE46F...
Procurement DPU Signature: Date: 11/24/2020 Tywana, Rhone A3F8AADA2C604F9...	(Purchase over \$5,000) CFO Signature Date: 11/19/2020 Temika Jones B9760A7ECDDC4F8...
(Purchase over \$5,000) Assistant or Deputy Director: Date 11/19/2020 Ray Miller B732B5A0CF455...	Director Signature (Only Consultant Services) Director or Designee: Date: 11/19/2020 Keith W. Byram 69AB087638E8190...

Attachments [Click here to attach a file](#)



City of Houston  
RFQ 6000093247 / 11/04/2020  
Harvey Economic Development Program  
HEDP Grant & HEDP Loan Programs  
Online

Clarence Moton  
[Clarence.Moton@houstontx.gov](mailto:Clarence.Moton@houstontx.gov)  
32-394-6212





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## Submission Statement

SurveyMonkey appreciates the consideration of the City of Houston Housing & Community Development's Harvey Economic Development Program to provide a proposal and quote for the HEDP Grant and HEDP Loan programs. Enclosed in our response you will find greater detail regarding SurveyMonkey, and we are hopeful you will identify our organization as the perfect partner to help promote the micro and small business recovery and redevelopment programs that are being offered. Many of our company values align perfectly with yours, and we are optimistic we will be granted the opportunity to help the HCD Department to drive the return to economic stability within the district for these entrepreneurs.

We have considered your needs and requirements to the best of our ability, and are certain that our proposed quote will resonate. Please be reminded that our proposals and descriptions within this response are based primarily on information we have determined from our discussions with you and your colleagues, and that we may have other options available to you. If you have additional requirements, asks, or would like to propose edits to our cost estimates, please feel free to contact us.

We look forward to your decision during your evaluation period, and for potential contract execution in the near future. You will notice that our implementation timelines align very well with your desired launch date to get the Harvey Economic Development Programs launched as quickly as possible, and we look forward to potentially adding value to your process.

Sincerely,



Maureen Knox  
Senior Account Executive  
[maureenk@surveymonkey.com](mailto:maureenk@surveymonkey.com) | 613.319.1831



## **Introduction: Organizational Capacity**

After having successfully delivered a wide variety of SurveyMonkey Apply sites to satisfy the many different use-cases of 1000+ organizations across the globe over the past eight years, we are confident that we can deliver an exceptional solution to World Education Services.

SurveyMonkey Apply distinguishes itself in a number of different ways, one of which is through the power of the easy-to-use workflow engine built right within the tool. By using this powerful feature in the software we have been able to serve client organizations from all walks of life for everything ranging from scholarships to grants, and many other unique processes.

Because of the broad nature of the type of clients that use SurveyMonkey Apply, the software has been developed in a very flexible and configurable format so as to allow almost any type of workflow for a competitive application/review process to be configured in the tool. Furthermore, SurveyMonkey Apply does not just stop at the application and review stage but also offers post-award workflow and even an award module that allows for the allocation of both monetary and non-monetary awards to candidates. SurveyMonkey Apply also has a robust API that can be utilized to build integrations with other products and services.

The SurveyMonkey Apply setup process (referred to as the “Implementation ” process) is a defined and refined process that has been established over eight years of working with customers and has allowed us to effectively collaborate and work with clients to set up SurveyMonkey Apply sites and train our clients on how to effectively manage said sites independently. We are confident that we can deliver outstanding results for you as we have done for others.

Security is always front of mind here at SurveyMonkey Apply and we have established policies and procedures for incident management. We are happy to report that we have been able to protect and safeguard our clients’ data against hackers and other such intrusions since inception. Some security information about our protocols are included herein.

SurveyMonkey Apply itself is constantly being enhanced and updated. Given the SaaS nature of the product, all customers always have the latest version of the software and do not pay for updates. Enhancements and fixes are delivered on a bi-weekly basis and major upgrades occur approximately once every 12 to 24 months.

We are confident that we will be able to address all the needs outlined in the Request for Proposal, given our experience working with similar projects and similar clients, our comprehensive implementation process, and most importantly, our dedication to service excellence.

## About SurveyMonkey Apply

SurveyMonkey Apply is a SaaS product created and supported by SurveyMonkey. Our software streamlines the collection, review, award and post award processes from end to end.

SurveyMonkey Apply operations are headquartered in the Ottawa (Canada) office of SurveyMonkey which staffs approximately 140 of the company's global populations of about 750 employees across offices in San Mateo, Portland, Seattle, Emeryville, Sydney and Dublin.

SurveyMonkey Apply is currently used by over 1000 customers ranging from government departments, colleges/universities, associations/non-profits, and corporations (from small businesses to Fortune 500) in over 20 countries around the world. Some of SurveyMonkey Apply's customers include the Gordon and Betty Moore Foundation, Hewlett Foundation, Aspen Institute, Columbia University, Google, the Financial Times, MacArthur Foundation, KaBOOM!, and the Sundance Film Festival to name a small handful.

SurveyMonkey Apply's power lies chiefly in its customizable rules/workflow engine that allows organizations to tailor SurveyMonkey Apply to their own processes rather than having to change their processes to suit the software system they are using. The system's flexibility has enabled our clients to use it for a wide variety of use cases, including applications and nominations for scholarships, awards, admissions, fellowship programs, grants, competitions and much more.

## About SurveyMonkey

SurveyMonkey is the world's leading online survey platform, with more than 2 million survey responses every day. The company was founded in 1999 with a focus on helping people make better decisions, and has built technology based on over 10 years of experience in survey methodology and web development. Customers include 99% of the Fortune 500, academic institutions, organizations and neighborhood soccer leagues everywhere.

SurveyMonkey, SVMK, is a publicly traded entity. As such, much of the information you might seek is made available to the public. We believe strongly that our status as a public company showcases the trust and optimism that our various stakeholders feel about the direction of SurveyMonkey. You can find more information about SVMK, here:

<https://investor.surveymonkey.com/investor-relations>

SurveyMonkey holds certain pieces of information on security as proprietary. We will not discuss our road map, or internal growth plans. We hope that the City of Houston would appreciate this type of information is not for public knowledge.

We already have an NDA with your department, and have provided security information previously but are happy to provide additional information as needed..

## **Contracting**

We believe that using our Master Services Agreement (“MSA”) will help to make the contracting process more efficient and productive for both parties. Given the specialized nature of our services, some of the terms included in your sample Contract do not reflect the nature of the service. We also cover service-specific issues in our MSA, such as privacy issues relating to transfers of personally identifiable information, audit rights, and acceptable use policy. Our MSA is specifically tailored to our service and reflects what we believe to be a reasonable starting position for negotiation.

If we were to work from your standard sample Contract, we would need to engage in a heavy markup, and then your legal team would need to spend time reviewing the redlines. This would ordinarily be followed by several rounds of negotiations, which results in a high time and resource expenditure for both parties. Moreover, the end result would look closer to our form of agreement given the need to tailor the agreement to our service.

We are always open to answering any questions you may have about our MSA, and discussing any specific changes your legal team may need to make to it. SurveyMonkey works with a number of universities, so we understand we often have to be flexible to enable you to comply with your local laws. In our experience, the process will proceed much more efficiently if we start from our form, which is specifically designed around our services.

## **Confidentiality**

“Confidential Information” means information disclosed by a party (“Discloser”) to the other party (“Recipient”) in connection with this RFP response that is either marked as confidential or would reasonably be considered as confidential under the circumstances. SurveyMonkey’s Confidential Information includes the terms of this RFP offer/response, privacy and security information, SurveyMonkey service and product features, and customer/client lists and references. Despite the foregoing, Confidential Information does not include information that: (a) is or becomes public through no fault of the Recipient; (b) the Recipient already lawfully knew; (c) was rightfully given to the Recipient by an unaffiliated third party without restriction on disclosure; or (d) was independently developed by the Recipient without reference to the Discloser’s Confidential Information.

As a condition of submitting this RFQ response/offer, the parties agree that the Recipient will: (a) protect the Discloser’s Confidential Information using commercially reasonable efforts; (b) use the Discloser’s Confidential Information only as permitted by these terms, including to exercise the Recipient’s rights and fulfill the Recipient’s obligations under this RFP response/offer; and (c) not disclose the Discloser’s Confidential Information without the Discloser’s prior consent, except to affiliates, contractors, agents, and professional advisors who need to know it and have agreed in writing (or, in the case of professional advisors, are otherwise bound) to keep it confidential on terms comparable to those under this Section. The Recipient may disclose the Discloser’s Confidential Information when and to the extent required by law or legal process, but only after the Recipient, if permitted by law, uses reasonable efforts to notify the other party.

## Key Personnel

SurveyMonkey believes in the strength of its people and so we wish to take the opportunity to describe our hard working and enthusiastic team of professionals below.

Role	Description of Role	Name
<b>Account Executive</b>	Maureen works on the Apply team, focused on the growth and expansion of our existing SurveyMonkey customers. She prides herself in understanding clients' business objectives, creating champions within accounts and building mutually beneficial partnerships. She has worked with some of the largest organizations in the world. Maureen will be the City of Houston Housing & Community Development main point of contact for any non-technical matters that may arise during the contracting period.	<b>Maureen Knox</b>
<b>Solution Architect – Manager, Customer Engagement</b>	Justine has been an Implementation Team Leader at SurveyMonkey for almost three years. She has built over 90 separate SurveyMonkey Apply sites, for various purposes ranging from fellowship applications and grant management processes to scholarship management systems. The systems she has built range from small (5-10 submissions per year) to large (over 10,000+ submissions per year). Justine and her team are responsible for gathering client specifications and building systems tailored to those specifications. The exact senior implementation specialist assigned to the account will depend on the timing of the contract award; however, Justine will ultimately be responsible for the proper setup and configuration of the site as manager of the Implementation Team.	<b>Justine Bijman</b>

## Similar Experience

SurveyMonkey has implemented a large number of SurveyMonkey Apply sites particularly for the purpose of emergency relief and business improvement grants and the team is confident that it can deliver on the requirements mentioned in the Request for Quote. As a result of having worked on so many different application intake and review programs, our team is very well positioned and experienced in a lot of the very specific and niche parameters as they relate to

application management systems including:

- Requesting of documents such as budgets, tax forms, that have been created with embedded calculations
- Providing visual evidence of damage (multi-media and file upload)
- Reference Letters
- Verification of registration numbers / status check if required
- Eligibility conditions and parameters for application programs
- Post-decision reporting and tracking
- Permissions/Roles for application Program Managers
- Ease of use for applicants and security/privacy considerations
- Exporting data for the purpose of compiling Summary Reports and Charts
- Ability to schedule automated emails and save email templates for later manual sends
- Ability to create templated programs with forms and tasks to use across federated accounts
- Introduction pages for each program with configured program title url, grant details, workflow and automations
- Multiple stage workflows with ongoing touchpoints and validation with applicants and reviewers/administrators
- Configured reports configured as desired, as needed

SurveyMonkey has been building such application systems for not only non-profit institutions but also foundations, associations, governments, educational institutions and others. The following is a non-exhaustive list of some of the clients we serve:

Greater Houston Community Foundation	Novartis
City of Houston Business Opportunity	Urban Institute
State of Texas Parks and Wildlife	Society for Science & the Public
State of Texas General Lands Office	Google
State of Texas Office of Attorney General	The Lemann Foundation
	Baylor College of Medicine
	Maine Community Foundation
	Hewlett Foundation
	Humboldt Area Foundation

## Main Features

Feature	Description
Applicants & Nominees	The ability to accommodate any number of applicant/nominee groups on the system; Simple to use interface allowing ease of use for applicants applying to either the fellowship, internship or award programs; Capability of allowing for eligibility criteria to help “guide the hand” of applicants: hiding and showing various fellowships, internships, or awards that can be applied to (based on merit or form responses), hiding and showing additional tasks and requirements to be provided based on variables, etc.
Reviewers	The ability to accommodate any number of reviewer groups to rank applications submitted to the system; Robust platform allowing for multiple stages/rounds of review, in which the ranking methodology can vary with each; Side-by-side style of review allows for simultaneous evaluation & scoring for maximum effectiveness and ease of use. Reviewers can be assigned based on individual programs, within a single stage or multiple stages of the workflow
Workflow Engine	The ability to design custom workflows and create automations to define what tasks applicants/nominees & reviewers to complete in different stages Programs can vary from one another, allowing for individual upload requirements, unique forms to be filled out, separate reviewing teams based on the program being applied to, etc. Program-based eligibility criteria
Payments	The ability to accept administrative fee payments via credit card online or offline and to track payments through the system.
Customizable Real-Time Reports	The ability to create reports in real-time and export the data in either .csv or Excel; Can be saved as templates, allowing for scheduling and “one-click” downloads of various reports.
Powerful Form Builder with Branching Logic & Validation	The ability to build any type of dynamic form using our best-in-class form builder; Advanced branching logic allows for guided responses, performing various actions based on form responses, can promote/demote applications based on these responses, can red-flag applications, and etc; Validation features allow various components of the form(s) to be confirmed based on preset thresholds. For example, confirming Zip Code consists of five numeric characters, ensuring text responses stay within certain word/character limits



Configurable Look & Feel + Domain Name (URL)	CSS and HTML editing are also permitted should additional configuration be required by an organization, above and beyond SurveyMonkey Apply's implementation process.
Content Management System	The ability to create web-pages or share common files with applicants/nominees and reviewers/judges on the system. Blogs and FAQ pages can also be created to run in tandem, allowing for additional resources to be shared outside of the actual application/review portals.
Administrators	<p>The ability to accommodate an unlimited number of administrator accounts, which allow for superuser access to all submissions &amp; data on the system (for edit/update functions) and to allow for changes to workflows and other customizations.</p> <p>Different hierarchies can be applied to Administrative staff, changing the rights and parameters of each user based on user-level capabilities.</p> <p>Restrict Administrative staff to individual programs, making it easy to manage Affiliates' programs with their own staff. Not able to see into, or affect, other Affiliates' programs.</p>
Full-featured API	<p>The ability to use the SurveyMonkey Apply API to build extensions into the software or to integrate with other third party tools. Salesforce.com is pre-built out of the box and can be mapped out accordingly within SurveyMonkey Apply. Additional integrations can also be created using the same API logic.</p>
Individual Program Workflows	Each program has its own front page, customizable sub-url slug, workflow, automations and reviewer assignments per stage. Administrators can be restricted to the individual program. Detailed dashboard is now included per program for easier use by the administrator. This permits full configuration for individual programs, but also the ability to create and control templates for quick duplication and control.
Organization Profile	<p>Organization Profiles allow users to register to your site and apply to programs on behalf of an organization. Depending on your preference applicants accessing your site can choose to register as an Individual, an Organization, or Both. If applicants are able to <b>register as both</b> within the site, you can also <b>configure the individual programs</b> to only be available to one or the other, or both options. When registering, applicants will be asked for basic information about the organization they are applying for, to allow you as a site administrator to gain a better sense of who is registering.</p> <p>When an applicant registers for an Organization, they will be considered the Primary Organization Administrator. They will also be able to add additional members to create and manage applications on behalf of an organization.</p>

## Implementation Methodology (Timeline)

Standard implementation timeline estimate: 8 weeks (minimum 6 week build period).



## Implementation Methodology (Implementation)

Once the client moves ahead with SurveyMonkey Apply, an Implementation Specialist (IS) is assigned to the account that will help the client setup and deploy the site and train the parties involved. Any integration and data import activities can also be worked on in parallel. SurveyMonkey Apply's implementation team has fine-tuned the process over the course of eight years and all staff are trained to deliver the best experience to clients and are evaluated based on a score that the client gives the implementation specialist at the end of the process.

## Major steps and Implementation Process Goals:

### Building a solution around you:

Defining, building, and launching a new software project can be a challenge for any organization. We're here to help. The SMAppl team provides comprehensive implementation services to set up solutions that meet your needs, efficiently and effectively.

Our implementation approach involves four steps: Discovery, Build, Review, and Launch. You'll work with a dedicated Implementation Specialist at each step, ensuring a successful and timely launch. The target timeline is four to six weeks, starting after our first discovery call, however you can have up to 90 days for the full build of the site if you feel the need to have a slower pace.

## **Discovery**

During Discovery, your Implementation Specialist works with you and your team to determine a detailed scope of work and timeline based on your requirements.

## **Build**

During Build, your Specialist creates your sites, programs, and workflows according to the scope of work, including the necessary stages, applicant and reviewer forms, and any required automations.

## **Review**

Once the site has been built and tested, your Implementation Specialist schedules a first Demo Call to review your project in detail. The Feedback Period then provides an opportunity to review and collect feedback. Your Specialist will make any required changes and schedule a second Demo Call to conduct a final review.

## **Launch**

When your project is ready to launch, your Implementation Specialist conducts the Launch Call, reviews with you how to contact the SMApplly support team, and equips you with additional training materials to support your success!

## **Proposed Timeline**

We feel strongly that with our minimum implementation of 4 weeks, and proposed timeline of 8 weeks, this project can formally launch within your timeline. This would require a signed order form/contract by no later than August 20th. To help with your planning the standard build commences within 2 weeks of account activation and then proceeds as above. We can expedite your build but prefer to build with a minimum of 6 weeks for a 2 program site, especially as you wish to include the second build as part of this period. This timeline will permit your primary administrator to become familiar with the solution and also confer with your Build Specialist to ensure testing, feedback, amendments, final walk through and launch.

## **Privacy and Security**

SurveyMonkey Applly has been successful at safeguarding client data throughout its history as security is taken very seriously and as the company has established comprehensive policies and procedures for incident/response management. We are happy to report that we have been able to protect and safeguard our clients' data against hackers and other relevant intrusions since inception. Some security information about our protocols is included below.

**WCAG 2.0 AA Compliance**

SurveyMonkey Apply's Application portal meets all federal requirements for online compliance and accessibility, assuring that any users with disabilities will be able to interact with your process. You'll be able to reach every applicant on one platform.

**Privacy & Data Ownership**

All data and user information that is collected on your SurveyMonkey Apply account belongs to you. We will not sell the information to anyone, and will only transfer, disclose and use the information for the purposes set out in our Privacy Policy and in accordance with applicable law. Here is the link for our Policy:

<https://www.surveymonkey.com/mp/legal/privacy-policy/>

**Physical Security**

SurveyMonkey's information systems and technical infrastructure are hosted within world-class, SOC 2 accredited data centers. Physical security controls at our data centers include 24x7 monitoring, cameras, visitor logs, entry requirements, and dedicated cages for SurveyMonkey hardware.

**Login Protection**

All accounts are password protected and all passwords are encrypted (i.e. never stored in clear text). Account logins also have brute-force login protection to prevent individuals/bots from attempting to guess a password too many times.

**Threat Scanning & Firewalls**

SurveyMonkey Apply servers are scanned for threats and vulnerabilities and are protected with Firewalls to prevent unauthorized connections.

**Scalability**

SurveyMonkey Apply does not limit the number of submissions you receive or the number of applicants or reviewer groups that use your system.

**Redundant Servers & Data Center**

SurveyMonkey Apply infrastructure uses redundant storage and servers to keep the application and your data available in the case of hardware failure – and another set of servers and storage in a geographically separate data center in case our primary data center is made unavailable by a disaster or other disruption.

**Backups**

Data in your SurveyMonkey Apply account is replicated across multiple locations to prevent a single failure from causing data loss. Your data is backed up nightly and stored in a secure offsite location to ensure that, even in the event of a catastrophe like a tornado or flood, your information will be safe and your records can be quickly restored. We maintain all backups for a period of 30 days. If you decide to delete your data from our system, it will remain in our backups for the next 30 days and after that point will be

permanently deleted.

### **Disaster Recovery**

While we do not publicly share our internal policies and procedures as we consider them confidential and proprietary, SurveyMonkey Apply infrastructure uses redundant storage and servers to keep the application and your data available in the case of hardware failure – and another set of servers and storage in a geographically separate data center in case our primary data center is made unavailable by a disaster or other disruption. In the event of a disaster at the primary facility, SurveyMonkey will engage in Disaster Recovery protocols. If escalated to the highest severity, SurveyMonkey’s leadership and engineering teams will run through our Disaster Recovery Playbook to transition the site to the secondary facility.

To prepare for these disaster scenarios, SurveyMonkey engages in “Game Day” operations quarterly, where an artificial disaster scenario is introduced and the team responds accordingly. And then can add if they have more specific questions or concerns around this we are happy to answer them.

### **Proposed Levels of Support**

SurveyMonkey Apply has non-binding Service Level Objectives, not SLAs. During support hours our support objective is to respond in 60 minutes. Administrators can use either email or request a call - both to respond to within 60 minutes.

Support hours are:

Monday through Friday:	8:00 AM - 8:00 PM EST
Weekends/Holidays (Canadian):	10:00 AM - 6:00 PM EST

Phone Support:

Monday through Friday	9:00 AM - 7:00 PM EST
Weekends/Holidays (Canadian):	Not available

## Application Intake Portal Functional Requirements

Requirement	SM Apply Response
Online portal for constituents to create a profile, fill out application forms, and submit necessary documents. The portal will have two modules viz. constituent facing and internal/admin.	Yes - SurveyMonkey Apply offers the ability to fill out forms and upload necessary documents, defined by you.
The portal should support at least two distinct application submissions viz. HEDP Grant Program and HEDP Loan Program.	Yes - Custom workflows can be created with their own criteria, in order to meet varying submission requirements of these two applications.
Security Compliance	Yes - SurveyMonkey has ISO 27001 and PCI DSS compliance that is renewed annually. SurveyMonkey Apply also ensures all data centers are SOC2 accredited.
Signup with Login Id/Password and contact information	Yes - SurveyMonkey Apply users email, first name, last name and password for account creation. Additional fields can be added to user registration if necessary.
Login with password	Yes
Fill out application (could be done in stages, so ability to save the draft and resume before final submission. Example: online income tax filing applications)	Yes - Application can be segmented into multiple tasks or multiple stages as required.
Upload documents associated with specific document types (documents types will be configured by the admin). Ability to upload PDF and videos (with size limit imposed)	Yes - Admins have control over type of documents uploaded, size of documents and number of documents. We allow for video uploads as well as linked media.
Mandatory documents are required for submission	Yes - Documents can be mandatory or optional
Check the status of application, and comments from admin	Yes - Comments from admins can be sent to applicants. Comments from reviewers can be made available in their portal. Statuses can be set and are viewable by applicants and admins.

<b>Admin Portal</b>	
Design Application Questionnaires (text, date, option-set, yes/no, long description fields)	Yes - SurveyMonkey Apply has an extremely flexible form builder, with more than 20 different question options.
Ability to configure business logic to mandate questions	Yes - Branching logic and automation is available to customize both applicant and reviewer experiences.
Ability to configure business logic to mandate questions based on dependent question responses (IF..THEN..ELSE workflow design capabilities) Ability to include instructions and examples in the online application interface.	Yes - Advanced branching logic is available within any form. Automations can also be used to configure logic depending on previously answered questions.  Yes - Instructions and examples can be provided in the task description, or in any question description within a form.
Ability to define document types and mark them mandatory, as required.	Yes
Ability to download application information in excel format	Yes - for administrators.
Ability to download documents (individual or combined in a zip format)	Yes - Individual PDF or merged PDFs are available.
Ability to built ad-hoc report for flexible reporting mechanism	Yes - Ad hoc reports can be built with SM Apply's data export tool.
<b>Background notification</b>	
Email notification to admins upon application submission	Yes - email automations can be triggered at any point in the workflow.
Email notification to applicant/admin for draft application expiration	Yes

Email admin for pending application approval beyond threshold limit (days)	Yes - Timed automated emails can be sent.
Email notification for application status update or RFI	Yes - An email can be configured to inform the applicant of any changes to their application at any step in the process.
<b>Support</b>	
Application uptime SLA	SurveyMonkey Apply maintains a 99.9% uptime. Status can be tracked here: <a href="https://status.fluidreview.com/">https://status.fluidreview.com/</a>
Critical issue resolution within 4 hours	SurveyMonkey apply support SLOs are included in the attached PDF.
Non-critical issue resolution within 24-72 hours	SurveyMonkey apply support SLOs are included in the attached PDF.
<b>Nice to Have features</b>	
Verify link to complete the sign-up process	Yes - Email must be verified in order to submit an application.
Progress Status Bar on the Application Form (sample illustration included below)	Yes - Progress bar on forms, as well as progress tracking for each task within a submission is available.





## Service Level Objectives

SurveyMonkey Apply and Fluidreview, have put forward service level objectives to meet the stringent needs of our customers and partners alike. This includes systems that monitor performance and availability, procedures to ensure we are meeting and exceeding our objectives, and conducting regular reviews focused on performance and availability. The following table identifies, in the event of an issue, our response and resolution times as well as categorization of issues and severity. Our key service level objectives are summarized below.

### Application Availability Objective of 99.9%

#### Problem Categorization\*

Categorization	Criteria
P1: Critical	An issue that halts the day-to-day activities of our customers. We consider these to be catastrophic and focus all our attention in the event this occurs to bring the system back to normal. These are monitored 24/7 and are posted to <a href="https://status.fluidreview.com">https://status.fluidreview.com</a> . Customers can also sign-up to receive email notifications on changes within the system
P2: Major	Issue involves severely impaired functionality to the product for customer(s)
P3: Normal	Issue involves slightly impaired functionality to the product for customer(s)
P4: Minor	Issue involves cosmetic issues or those with no business impact

#### Target Response Times-

Categorization	First response	Solution to the Problem
P1: Critical	60 minutes	1 businessday or less
P2: Major	60 minutes	Within 10 business days
P3: Normal	60 minutes	10 - 20 business days
P4: Minor	60 minutes	Based on business priorities

**\*\*Responses to problems are carried out during our regular support hours: Monday-Friday 8am-8pm, Weekends 10am-6pm**

## Costs/Pricing Option

We would ask that this pricing be kept confidential

<https://apply.surveymonkey.com/pricing-plans/>

Costs/Pricing	
Feature	Explanation
SurveyMonkey Apply Pro level	<p>Capacity for:</p> <ul style="list-style-type: none"> <li>• 1 hosted site</li> <li>• 2 individual/unique programs</li> <li>• 1,000 applicants/co-applicants</li> <li>• Unlimited reviewers</li> <li>• Unlimited administrators</li> <li>• Unlimited access to online administrator self-training tutorials</li> <li>• Request a callback support for administrators</li> <li>• Organizational Profile</li> <li>• API access</li> <li>• Access to Salesforce Integration</li> <li>• Custom Sending email address</li> <li>• 3 hours of IS time each annual renewal for site refresh</li> <li>• Site maintenance</li> <li>• Data storage</li> </ul> <p>*This subscription includes the setup of the first requested program within a 90 day period. Through our implementation and with access to our administrator self-training videos you and your staff will be able to add and remove programs with ease.</p>
Hosting	included with the annual contract
Maintenance	included with the annual contract
Support	Unlimited - included with the annual contract Administrators can request a call back within working hours.

Professional Services / Implementation	Full set-up of the hosted site, build out of the first program (workflow, forms, tasks, templated emails, automation), coaching on self-training administrator tutorials and report building
Training	<p>Unlimited online self-training for administrators is included</p> <p>Additional training available at a packaged cost.</p>

2 program site, full build, 1000 applicants Multi-year options	
1 Year Contract	\$10,000 USD
2 Year Contract (5% discount)	\$19,000 USD ( annual payment of \$9,500)
3 Year Contract (10% discount)	\$27,000 USD ( annual payment of \$9,000 )

Costs/Pricing - Add on Fees to consider	
Feature	Explanation
Additional Build Time - estimates provided in advance	Available at \$1,000 USD/5 hour block
Additional User Capacity - additional 1,000 applicants	\$950 per year
Additional Program Capacity - per	\$700 per year

## Quote Pricing

2 program site, Full build of both programs, 1000 applicants	
1 Year Contract	\$10,000 USD total commitment

\*This fee includes full build of a hosted site, 2 program workflows including forms, automations and business logic, evaluation rubric, eligibility, application and post-decision workflow stages. It also includes full technical support for all users following launch. There are no additional fees.

### Date until which proposal is valid

Please note that the above proposal is valid until March 1, 2021.