

Wayne RESA

RFP # WRESA-37-2025-2026-03

Grant Management Database

June 27, 2025

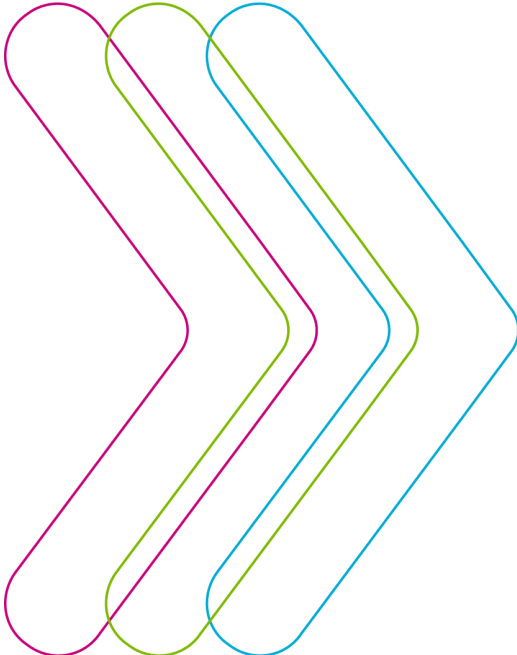


Table of Contents

SECTION 1.0 – PROPOSER RESPONSES TO SCOPE OF WORK AND PRICING	3
Proposal Section Intro - Letter of Transmittal	3
Proposal Section I – Executive Summary	4
Proposal Section II - Scope of Proposed Solution	6
Proposal Section III - Comprehensive List of Assumptions	15
Mandatory Requirements and Scope of Work Response	16
SECTION 2.0 – PROPOSER INFORMATION AND ACCEPTANCE	24
Appendix A - Regional Map	33
Appendix B - Additional Software Features	34

SECTION 1.0 – PROPOSER RESPONSES TO SCOPE OF WORK AND PRICING

Proposal Section Intro - Letter of Transmittal

June 23, 2025

RE: RFP #37-2025-2026-03 – Grants Management Database

Dear Evaluation Committee,

Fluxx Labs Inc. is pleased to submit this proposal in response to RFP #37-2025-2026-03 for the provision of a modern, flexible, and secure Grants Management System for WRESA and its partner organizations. We appreciate the opportunity to support your critical mission through technology that improves transparency, efficiency, and stakeholder collaboration.

Legal Information:

- **Company Name:** Fluxx Labs Inc.
- **Corporate Address:** 2261 Market Street, Suite #4060, San Francisco, CA 94114
- **Legal Entity Type:** Corporation (C-Corp)
- **Website:** www.fluxx.io

Primary Contact:

- **Name:** Steven Lucas
- **Title:** Senior Account Executive
- **Email:** steven.lucas@fluxxlabs.com
- **Phone:** 737-267-0643

Our proposal addresses all major components outlined in the solicitation, including:

- A cloud-based grants management platform supporting the complete grants lifecycle—from application and review through award, monitoring, and reporting.
- Configuration and onboarding services guided by a Blueprint Workbook, ensuring alignment with WRESA's business needs.
- Training and support resources including Fluxx University, sandbox environment, and tailored training during implementation to ensure adoption and success.
- Compliance with WRESA's stated requirements for usability, accessibility, data security, and accountability.

We are confident in our ability to deliver a solution that meets and exceeds your expectations and are enthusiastic about the potential to support WRESA's growing network. Thank you for considering Fluxx as your partner. Please do not hesitate to contact us with any questions or requests for clarification.

Sincerely,



Ashley Boyer, Chief Revenue Officer
Fluxx Labs, Inc.
2261 Market Street #4060 San Francisco, CA 94114

Proposal Section I – Executive Summary

Executive Summary

Fluxx is proud to propose a flexible, cloud-based Grants Management System (GMS) designed to help WRESA and its partner organizations streamline the entire grants lifecycle—from application through reporting. Built to serve public agencies and nonprofits, Fluxx provides a modern, intuitive platform that increases transparency, improves collaboration, and enhances compliance.

Key Differentiators

Fluxx stands apart through our deep specialization in the grants space and our commitment to client success. Our solution is built *for grantmakers by grantmakers*, and is trusted by some of the largest philanthropic and public-sector institutions. What differentiates us includes:

- A dedicated **Client Success team**, assigned from onboarding through the life of the contract.
- Access to **Fluxx University**, our on-demand training platform, and the **Fluxx Community**, where users can learn and share best practices.
- A strong change management approach that includes sandbox testing, tailored training, and post-launch support to ensure smooth transitions and high user adoption.
- Commitment to accessibility, compliance, and ease of use, with continuous product enhancements delivered securely in the cloud.

Understanding of Requirements

We understand WRESA's need for a scalable, secure, and easy-to-use platform that supports the full spectrum of grantmaking operations—from financial tracking and document management to reporting and compliance. Our proposal fully responds to the specifications across all three areas—Secure, Usable, and Trustworthy—as outlined in Attachment B. Our system supports both centralized and distributed workflows, helping WRESA meet its responsibilities to internal stakeholders and statewide partners.

Project Execution Plan

Our typical implementation timeline ranges from **6-12 months**, with adjustments based on complexity and available client resources. We begin with a structured planning phase using the **Blueprint Workbook**, followed by sandbox configuration, training, testing, and go-live support. We do not anticipate equipment delays, as our solution is 100% SaaS-based and hosted on scalable, reliable cloud infrastructure.

Risk Management

Our delivery model minimizes risk through:

- Clear roles and responsibilities outlined at project kickoff.
- Ongoing weekly status calls and documented milestones.
- Use of a sandbox environment for safe testing and validation.
- Escalation protocols and post-launch support to resolve any issues quickly.

Value to WRESA

By selecting Fluxx, WRESA gains a proven partner that delivers more than software—we deliver outcomes. Our clients report:

- Up to **80% reduction** in administrative processing time.
- Enhanced compliance and audit-readiness.
- Greater stakeholder satisfaction due to real-time visibility and simplified interfaces.
- Long-term adaptability as organizational needs evolve.

We are excited about the opportunity to partner with WRESA and support its mission with a system that is purpose-built for grantmaking and ready to scale across the state.

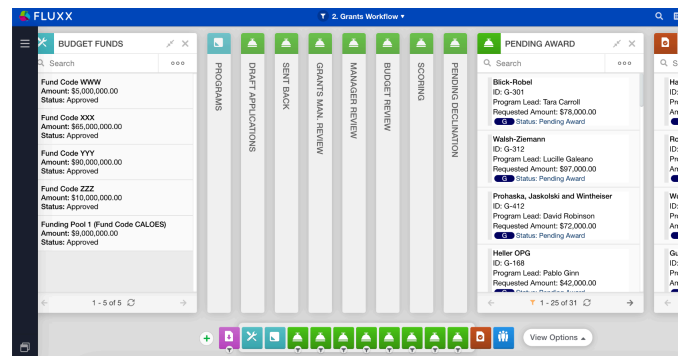
Proposal Section II - Scope of Proposed Solution

Fluxx Grantmaker

Everything all in one place. We understand that having a database, applications, review, reporting and disbursement contained in one software program would address all of your pain points. Fluxx is the only solution where you are never more than one click away from relevant data. Our system captures, structures and connects all data and centralizes it to provide a more comprehensive view of the grantmaking process. No other software gives you this level of visibility into the grants lifecycle, helping you to foster better decisions throughout the process.

- Connected data
- Global search
- Audit trail
- Program-related investments (PRI)
- Scenario planning
- Multiple Fund Management
- Mobile app
- Multi-language support
- Customized Stages & Workflow
- Due Diligence and Risk Assessment Tracking
- Easily assign reviewers and full Reviewer Portal
- Full Grant Lifecycle
- Geographic Specific Planning
- Multi-factor authentication and Single Sign On
- Funding Source Allocation
- Leadership Summary
- e-Signature through DocuSign
- Plugins: Microsoft Outlook, Excel, and Word
- Full CRM capability
- Collaboration tools: Messaging & Notes,
- Auto Email Alerts, Task Assignments
- Free Candid integration for charity status checks
- Performance Indicators
- Strategic Initiatives
- Impact Data Gathering
- Tracking & Measurement
- Payment workflows & refunds
- One Stop Shop for Grantees through the Grantee Portal
- **and much more...**

Fluxx Grantmaker is designed to be versatile, both cross-operating system and cross-browser compatible. While the platform is broadly accessible, for optimal use of Word and Excel plug-ins, we recommend Windows 10 or newer. Additionally, Fluxx is mobile-responsive. It's tailored for smartphones and tablets, offering users an enhanced Online Portal and Mobility Solutions experience. With native iPad, iPhone, and Android apps, all Grantmaker system staff users can easily access their custom dashboards and search/view Fluxx data. These mobile apps are readily available for download on iOS and Android platforms.

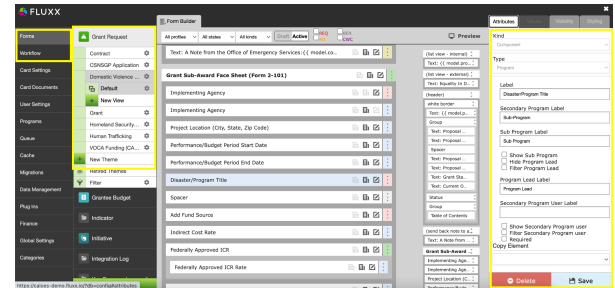


Administrator Module

Fluxx's Admin module will enable Wayne RESA's staff to manage the configuration in Fluxx, build or modify application forms, grantee forms, and documents, workflows, agreements, automated emails, letters, etc. on its own.

The Admin Panel is the “backend” of the Fluxx system that holds all configuration options, organized by its functions, each offering configuration capabilities to ensure that your platform matches your processes, people, systems, and data.

The ability for organizations to control and evolve their configuration internally is definitely one of Fluxx's biggest/best differentiators. Our Admin Module will enable Wayne RESA to manage, grow and innovate your program without additional costs or direct intervention from the Fluxx team.



- **Forms** - Admins have the ability to build forms, update fields, as well as copy fields (or groups of fields) across the various grant types.
- **Workflow** - Admins can configure all workflows, role permissions, state transitions, and associated action buttons as well as insert validations on both data and documents as it moves applications/reports through the critical path process.
- **Card Settings** - Admins can control the field values and relationships of each card type and field therein.
- **Finance** - Budgeting views can be configured and adjusted in this section.
- **Create Documents** - Admins can create and edit outputs like letters and emails as well as document permissions and categorization. Admins can set up any number of letters and email templates that include merged fields from the database based on workflow transition steps or report due dates.
- **Adjusting User Settings** - Permission/access controls are set here that defines what a user can access, action upon, and control.
- **Global Settings** - All system features and site behavior settings can be found here, including the look and feel of the site and your specific branding

Internal User Portal

Through Fluxx's unique, intuitive user interface, Wayne RESA will garner increased collaboration, clarity, and organization of data.

The interface is akin to a “Kanban Board” and is designed to help the user visualize work, filter work-in-progress, and maximize efficiencies or flow. Fluxx uses cards and filters to display the various stages in the workflow specifically for programs to display when they are required to take action on a record. These dashboards are all configurable and consist of user-defined filters on items such as Grants Management, Budgeting, Contact Management, and Project Management.

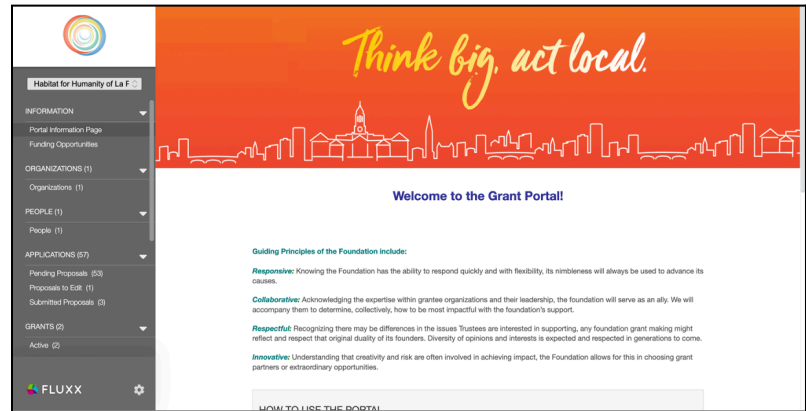


This card-based interface provides robust search and filter capabilities to narrow the data at an individual user level. The user can then apply unique visualizations of underlying data: list, detail, summary, spreadsheet, printable, and visualization views.

Grantee Portal

Incredible applicant experience with an easy-to-use interface and open communication with the program team.

Our Grantee Portal is the one-stop-shop for external users to manage their holistic relationship and information as part of your partnership. The interface is intuitive for users and the portal provides a clean design and centralizes everything for an applicant in their relationship with the grantmaker. It offers users access to personalized dashboards on the various related grants, information, links, documents, images, etc. From the Applicant Portal, awardees can easily create, edit, submit and manage proposals as well as load all information, documents, forms, files, videos and images up to 1GB each into Fluxx which has unlimited storage space.



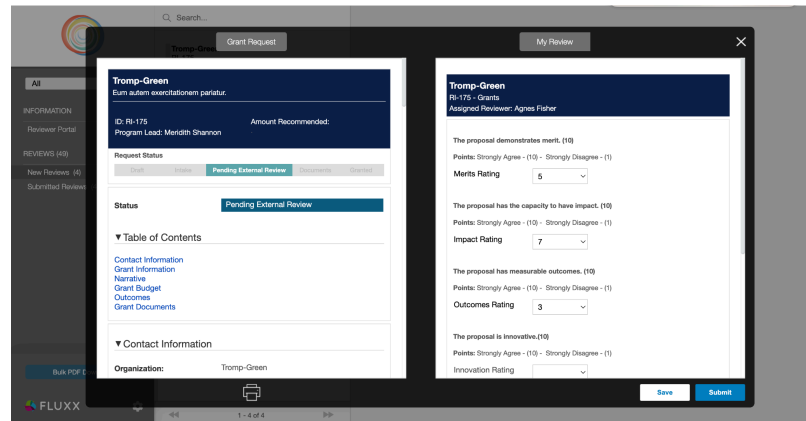
This system is linked with funding opportunities, due diligence, progress reports, payments, and impact analysis. When a proposal is submitted, it is sent to the appropriate individual (or panel) reviewers based on the specifics of the request or grant scheme. After a grant is approved, information about milestones, outcomes, and payments is available on the Portal. Awardees are notified when reports are due and can submit the required information for review and approval.

Reviewer Portal

Wayne RESA's review process becomes effortless and backed by automatic notifications, workflows, and task assignments in a collaborative environment.

Individual applications can be assigned to one-off reviewers and/or pooled in groups/panels for screening, reviewing, and scoring purposes. When reviewers are assigned to applications (either individually or by groups), they can be assigned to specific review forms. Reviewers would then receive an automated message of the newly assigned review, log in and easily view assigned requests (and attachments), and complete the customizable review form.

The system enables multiple reviewers to complete an online form and enter narrative text comments concerning either individual rating categories and/or an overall comment.



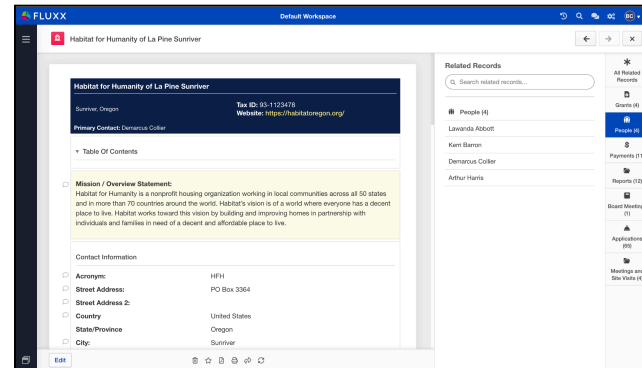
- The core system provides reviewers with different online review forms that contain different comment and scoring sections.
- All reviewer fields and comments can be aggregated, weighted, and collated data from the reviewers and can factor into the decision to proceed with the grant.

Contact Management - Grantee Relationship Management

Wayne RESA will have access to contact information and data at your fingertips at all times.

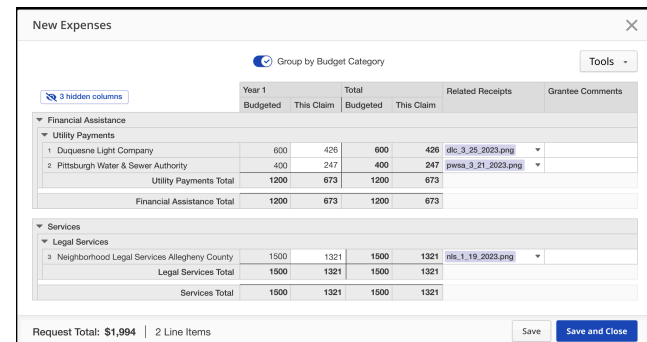
Fluxx integrates grants management with a contact database, enabling users to track multiple contacts, organizations, and historical associations in one platform. Wayne RESAs can categorize, communicate, and collaborate efficiently while maintaining a holistic view of funding relationships.

A Grantee Moderator can centrally manage organization details, associated users, and submitted requests, streamlining oversight. Fluxx's search and deduplication tools help identify and merge duplicate records while preserving audit histories, ensuring data integrity and accuracy.



Post-Award Functionality & Grant Budget Tracker

The Grant Budget Tracker in Fluxx streamlines grant financial management by centralizing budgets, tracking expenditures, and ensuring alignment with program goals. It provides real-time data visualization, customizable dashboards, and automated calculations, reducing manual effort and errors. Users can monitor funding allocations, spending trends, and financial health at a glance, making informed decisions to keep programs on track. Integrated with Fluxx's forms, workflows, and reporting, the tool supports custom fields, role-based permissions, and an audit trail to enhance transparency, security, and compliance, fostering trust among stakeholders.

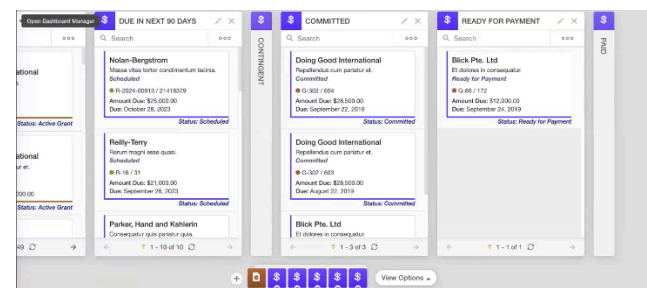


The screenshot shows a 'New Expenses' window with a table of budgeted and claimed amounts. The table is organized by category and includes columns for Year 1 Budgeted, Year 1 This Claim, Total Budgeted, and Total This Claim. It also includes links to related receipts and grantee comments.

	Year 1		Total		Related Receipts	Grantee Comments
	Budgeted	This Claim	Budgeted	This Claim		
Financial Assistance						
Utility Payments						
1 Duquesne Light Company	600	426	600	426	rlc_3_26_2023.png	
2 Pittsburgh Water & Sewer Authority	400	247	400	247	pwes_3_21_2023.png	
Utility Payments Total	1200	673	1200	673		
Financial Assistance Total	1200	673	1200	673		
Services						
Legal Services						
1 Neighborhood Legal Services Allegheny County	1500	1321	1500	1321	nls_1_19_2023.png	
Legal Services Total	1500	1321	1500	1321		
Services Total	1500	1321	1500	1321		

Request Total: \$1,994 | 2 Line Items

Budget Assignment via Program Hierarchy - Fluxx offers a comprehensive budgeting solution that delivers real-time insights into budget tracking, forecasting, and fund allocation. Allocations can be established by Financial officers and closely monitored using the out-of-the-box functionality. Users can manage proposed budgets across a four-tiered program hierarchy: program, sub-program, initiative, and sub-initiative. Budgeting can span multiple years and be set according to either cash or accrual accounting methods.



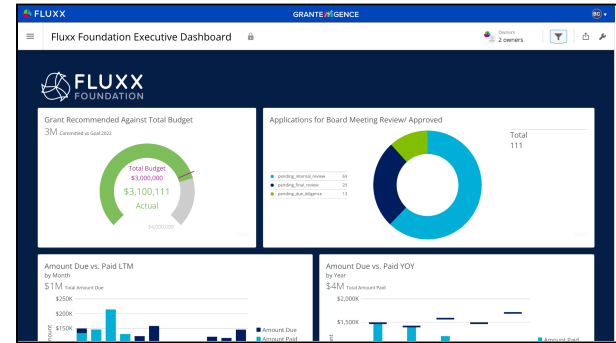
The screenshot shows three panels of budget assignments. The 'DUE IN NEXT 90 DAYS' panel lists items like 'Nolan-Burgstrom' (Status: Scheduled) and 'Reilly-Terry' (Status: Scheduled). The 'COMMITTED' panel lists items like 'Doing Good International' (Status: Committed) and 'Blick Pte. Ltd' (Status: Committed). The 'READY FOR PAYMENT' panel lists items like 'Blick Pte. Ltd' (Status: Ready for Payment).

Cost Center Assignment via Funding Sources - Fluxx simplifies allocating funding sources to overarching funds such as grant schemes, incoming capital, or trustees. Internal program teams can then access these consolidated funds, allowing them to view, manage, and allocate these resources for different grant applications. When funds are earmarked for a particular application or grant, Fluxx logs it as a pending commitment, ensuring transparent budget oversight at every hierarchical tier. Any unspent funds returned within a fiscal year can be seamlessly reintegrated, ready for future allocation.

Reporting

Our reporting capabilities provide real-time data that can be exported and utilized during board approvals, budgetary meetings, and for data-driven decision-making.

Fluxx's robust reporting features provide access to cutting-edge data visualizations, canned reports, and ad-hoc queries - simplifying the creation of donor statements, board docket, status reports, demographics reports, conversion funnels, and more. Fluxx permits users to analyze the impact of each program, the degree of success of the grants therein, the effectiveness and efficiency of teams, the speed of the grant approval process, how initiatives and programs compare, how funds were spent, and all associated metadata, such as constituents and means. We have highlighted specific reporting capabilities below:



- **Card-based Queries and Dashboards.** Fluxx's robust card and dashboard user interface enable users to create and filter personalized views of the records and data feeds to reflect their organizational roles and activities. All cards and dashboards represent the entire database of information and can be pulled into views and Excel for slice and dice.
- **Ad-Hoc queries and downloads.** Ad hoc reporting is handled by our card filters and parameters. It is a tool that allows users to select fields, filter data, and output a report template. Our Ad Hoc report builder is quite powerful. Users can define columns, group fields, sum fields, and export formats (Excel, PDF). After it is created, the report can be re-used as often as needed. When the report is generated, the fields refill with current real-time data. Any Ad hoc report can be added to the Live Reports menu and become a Standard Report.
- **Excel-Plug In.** Data reporting templates are created directly in Excel (with refreshable data feeds from Fluxx) to allow richly formatted reports and powerful Excel functionality into repeatable templates, multi-tab reports, and rollup field calculations.
- **API and Workato Integration Framework.** Fluxx also offers robust APIs and frameworks for extensive integration and downstream application and website work.

Grantelligence, our embedded BI tool,

is the only intelligence, analytics, and reporting tool purpose-built for grantmakers and powered by Domo. With an intuitive interface, drag-and-drop functionality, and a menu of 150+ dynamic visualizations to support your stakeholder and leadership reporting needs.



Integrations

Fluxx has the ability to pull in data feeds using REST APIs, as well as integrate with other REST services from third-party applications and integrations using our two-way synchronous API. Fluxx offers two options for Wayne RESAs to integrate Fluxx with CRM and/or financial systems:

1. Implementation via Workato, our preferred middleware platform

- Pre-built CRM Integrations: Salesforce
- Pre-built Financial Integrations: NetSuite, Sage Intacct, Quickbooks Online, Bill.com

2. Implementation via the Fluxx API by a Fluxx partner or Wayne RESA technology team

- Should Wayne RESA desire a direct integration with a system we do not currently integrate with, our typical process is to provide our Wayne RESAs' developers with access to the Fluxx API and the Wayne RESA can then integrate its Fluxx platform with other business-critical software environments.
- As part of Wayne RESA's annual subscription, Fluxx will provide developers access to the API documentation, guidance on how to create an Application key-pair (as an Admin) to procure an authorization token, what the different versions of the API are capable of, and parameters that can be included in the API call, and accepted HTTP Methods

In addition, for systems that do not have APIs available, Fluxx can engage with third-party applications using export/import capabilities. Fluxx creates the respective files to mimic the required integration specifications of the system.

ENDLESS INTEROPERABILITY

Don't Operate as an Island

Connect your grants management work with data from your wider technology ecosystem

- **Standard, no-cost integrations & connections** with *DocuSign, Candid Charity Check, Demographics via Candid, OFAC, LexisNexis Bridger, Zapier, Power Automate & Microsoft 365*
- **Add-on integrations** with leading CRM, financial, SAML 2.0-supported SSO solutions & Sam.gov
- Use our **open API** to create custom integration with all your tools



Transformation Implementation Plan and Approach

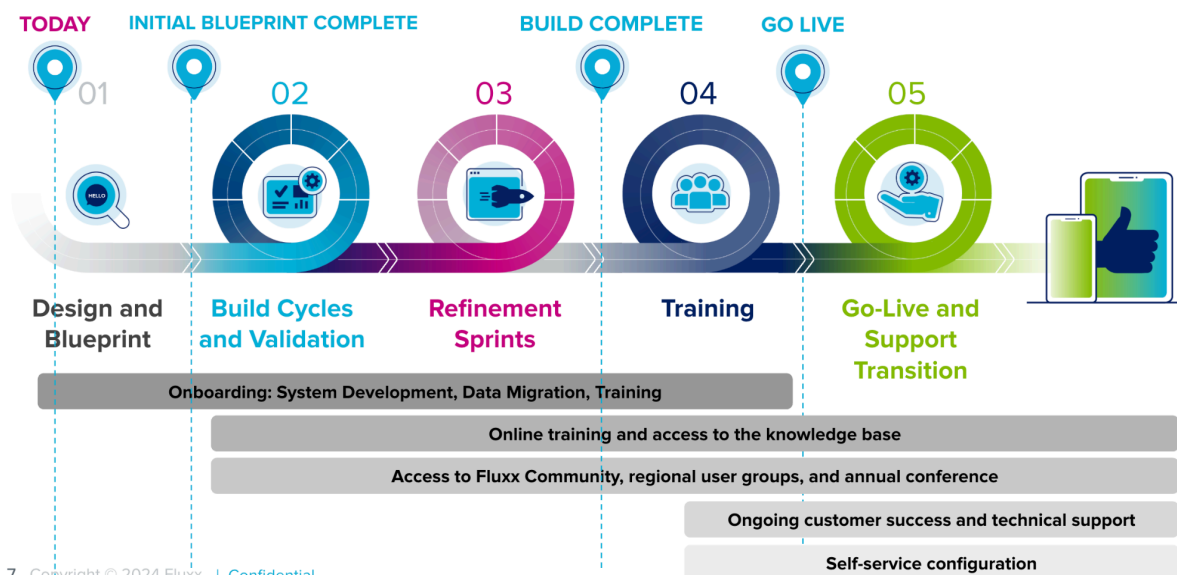
With structured project management, real-time tracking, and proactive risk mitigation, Fluxx empowers your team to confidently adopt and optimize the platform for long-term success.

This section details our onboarding process so that the Wayne RESA can become familiar with the terms and steps to onboarding. Also included is a project work plan with tasks required to complete the onboarding of our solution, including tasks and responsibilities where Wayne RESA will be engaged.

The Fluxx Team uses a collaborative onboarding approach based on product development agile principles, meaning that we focus on being collaborative and iterative throughout the entire process and build as we go. We get you into the site early and often to validate progress so that at the end of the project, you are comfortable using Fluxx and have a viable system to launch your processes.

- **Project Kickoff:** Our initial focus is to get Wayne RESAs up to speed on the Fluxx team and onboarding process/approach) while setting expectations and a tone for success. Initial requirements elicitation and scope assessment begins as we know the Wayne RESA and its needs. This prepares us to dive deeper into your requirements during the next phase.
- **Onboarding:** During our onboarding workshops, we will begin requirements gathering, the findings of which will help us design the blueprint of Wayne RESA's Fluxx instance. This will be the plan that informs our build during the configuration and validation phase. We also finalize our validation of the full scope of deliverables and create a project plan to suit the project's needs.
- **Configuration & Validation:** Collaborate to understand Wayne RESA's needs to build and validate the system. This phase breaks down the configuration of Wayne RESA's instance into smaller parts – focusing on different functional areas of your processes. We also start iterating on the data migration, building reports/outputs, and ongoing training.
- **Launch and go Live:** Preparing your staff/admin & final go-live steps. This phase includes full regression testing, final change management & training activities, and collaboration on your launch playbook for a successful go-live.

The graphic below illustrates the onboarding process from the project kickoff, to launch and go-live, and ongoing support.



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- **Design and Blueprint.** The onboarding approach includes the collection of requirements, forms, and workflows that will occur from sales throughout onboarding starting from our Grantmaker transformation template. Blueprint Workshops are a series of structured discussions designed to dive deep into your organization's unique grant-making processes. These sessions are essential to our understanding and documentation of your specific needs in forms, processes, and reporting requirements. The goals of the Blueprint Workshop are to gain an in-depth understanding of your unique needs, development of the Blueprint Workbook, and Scope Confirmation. Typical Workshop Agenda Topics include:
 - **Topic 1:** Introduction to Fluxx, Registration, Organizations, User (Roles/Profiles)
 - **Topic 2:** Pre-Award: Application Forms and Workflows
 - **Topic 3:** Post-Award: Grantee Reports
 - **Topic 4:** Post-Award: Payments & Amendments
 - **Topic 5:** Programmatic Budgeting
 - **Topic 6:** Outputs: Ad hoc reports, Emails, Letters
 - **Topic 7:** Miscellaneous/Add-Ons
- **Build Cycles and Validation.** This phase consists of agile development sprints across 6 specific cycles. The Fluxx team will hold a cycle planning meeting to confirm requirements for that specific build, Fluxx will build the configurations of the cycle, demo the cycle and train Wayne RESA on how to validate, and have Wayne RESA provide user acceptance validation. Wayne RESA will submit tickets for any refinement needed while Fluxx iterates on the build based on Wayne RESA feedback. As Fluxx moves through each cycle, we build upon what was developed prior, Wayne RESA will see the system growing to reflect the final comprehensive product in the end. Phases for each cycle will include:
 - **Design/Planning** - Meeting to reconfirm the cycle schedule, associated tasks or training to support the cycle, and review design blueprint for the cycle's configuration
 - **Build/Configuration/Demo** - Fluxx will configure the site to Wayne RESA's requirements, hold a demo, and train Wayne RESA on how to validate that cycle
 - **UAV** - Wayne RESA will test and validate all build/configuration is complete while Fluxx will iterate to address feedback provided via ticket submission. Additional demos, training, and support are provided to Wayne RESA during this phase as needed.
 - **Sign-off** - Once UAV is complete a formal cycle sign-off meeting is held so we can move to the next cycle and build upon previous cycles.
- **End-to-End Refinement and Go-Live Prep.** The refinement cycle phase is broken down into 4 refinement cycles: People, Process, Forms, and Outputs. Wayne RESA and Fluxx will confirm the configuration build against the initial requirements to confirm we have completed the finalized experience for both internal and external users. Wayne RESA will then do a final test and validation to fine tune the system. This final refinement should have only small refinements needed, as larger refinements would be completed during the Build Cycles and Validation phase. Prior to and in preparation of go-live, Wayne RESA will complete end-to-end system validation and launch readiness activities for final sign-off and system go-live.
- **Support Transition.** Upon completion of scope deliverables (go-live milestone), the project will move into a 30-day Support Transition period. There will be a weekly 1-hour meeting cadence during this transition period. Wayne RESA will begin to utilize the Support ticket management Jira system for any issues or bugs found during this ti

Key Activities, Milestones, and Deliverables by Project Phase

Phase	Activities <i>Note that activities denoted with (*) are Wayne RESA responsibilities in collaboration with Fluxx</i>	Milestones and Deliverables
Design and Blueprint	<ul style="list-style-type: none"> ● Gather all current documentation ● Confirm Blueprint Workbook* ● Discuss & Review Approach ● Data Migration prep (if needed) ● System Integration Review ● Project Management & Timeline 	<ul style="list-style-type: none"> ● Complete Blueprint Workbook ● Create Project Plan ● Project Timeline Delivered
Configuration, Build Cycles, and Validation	<ul style="list-style-type: none"> ● Configuration & Build ● Review of requirements ● Demo configuration and build ● Wayne RESA Testing and Validation* ● Refinement 	<ul style="list-style-type: none"> ● Complete site configuration ● Deliver and demonstrate configuration and build ● Feedback ● Approval
Data Migration	<ul style="list-style-type: none"> ● Wayne RESA Data Preparation and Transformation* ● Wayne RESA Data Validation* ● Document Upload ● Testing ● Sign-Off 	<ul style="list-style-type: none"> ● One (1) initial migration ● Up to three (3) iterations, with the final iteration (“dress rehearsal”) ● One (1) initial document mapping (during dress rehearsal) ● One (1) final data and documents final migration for Go-Live cutover
Integrations	<ul style="list-style-type: none"> ● Support and Configuration for plug-ins ● Map process and identify what is in scope and out of scope on connectors and integrations 	<ul style="list-style-type: none"> ● Data Testing ● Approval
End-to-End Refinement and Go-Live Prep	<ul style="list-style-type: none"> ● End-to-End Testing* ● Sign-Off ● Release & Go-Live 	<ul style="list-style-type: none"> ● Final configuration sign-off and approval
Post Go-Live Support Transition <i>(30 days)</i>	<ul style="list-style-type: none"> ● 30-day Support Transition post delivery ● Weekly meetings with the project team ● Support questions and troubleshooting 	<ul style="list-style-type: none"> ● Address configuration errors, bugs, and questions ● Empower users to transition to admin and take system ownership
Training <i>(Ongoing Post Go Live)</i>	<ul style="list-style-type: none"> ● Provision Online Learning System ● Provide Knowledge Transfer for Future Train the Trainer Session ● Instructor-led training hours 	<ul style="list-style-type: none"> ● Complete Online Learning ● Complete Learning Sessions

Proposal Section III - Comprehensive List of Assumptions

To support transparency and clarity, the following assumptions have been made in relation to the proposed Grant Management Database implementation. Each assumption is tied to specific sections of the RFP and is presented to ensure alignment of expectations for project delivery, scope, and performance.

1. General Scope & System Configuration

- **Reference:** RFP Section 1.3 – Scope of Work
 - It is assumed that WRESA requires a comprehensive, end-to-end cloud-based grants management system including application intake, financial tracking, compliance management, and reporting.
 - The solution will be configured, not custom-developed, to meet WRESA's requirements using existing platform capabilities.

2. Deployment & Timeline

- **Reference:** RFP Sections 1.6.1 (Contract Performance) and 1.3.1 (Attachment B – Specifications & Requirements)
 - It is assumed that WRESA will collaborate in a timely manner for key milestones (e.g., approvals, user testing, training), enabling implementation to begin upon contract execution and be completed within a standard 6–12 month window.

3. Hosting & Data Access

- **Reference:** Attachment B – Specifications & Requirements (A. Secure)
 - Fluxx will host WRESA's data in a secure, ISO-certified cloud environment (e.g., AWS).
 - It is assumed that data access will be restricted to authorized WRESA personnel and designated Fluxx support staff as needed, following least-privilege access policies.
 - Fluxx makes all Client data available to authorized personnel to maintain compliance with retention requirements General Schedule for Michigan Public Schools as long as the contract is performed up to and including the contract close out date. Personal Data that is necessary for the performance of the contract with the Client/User can generally be retained as long as the contract is performed. Churned Client data will be deleted 30 days from the date of contract close and will be deleted from the database in accordance with the account termination process.

4. Client Responsibilities

- **Reference:** Section 1.3 Scope of Work and 1.6.1 Issue Management
 - It is assumed that WRESA will assign a project lead and relevant staff to participate in discovery sessions, review configurations, complete user acceptance testing (UAT), and attend training.
 - WRESA will provide timely responses to configuration decisions, content gathering (e.g., forms and templates), and business process inputs.

5. Support and Maintenance

- **Reference:** Section 1.6.1 Change Management and Customer Service (1.7)
 - It is assumed that post-launch support will include access to Fluxx's ticketing/help desk, online knowledge base, Fluxx University, and Community Portal.
 - Any requests for custom enhancements beyond configuration of out-of-the-box features may be scoped and priced separately.

Mandatory Requirements and Scope of Work Response

1.1 Minimum Mandatory Requirements

All proposals will be reviewed for compliance with the minimum mandatory requirements. Proposals deemed non-responsive will be eliminated from further consideration.

Interested and qualified proposers that can demonstrate their ability to successfully provide the services requested under this RFP are invited to submit proposal(s), provided they meet the following:

1. Proposer must have three (3) years' experience, within the last three (3) years, providing a Grant Management Database equivalent or similar to the commodities and/or services being requested in this proposal. Enter in Section 2.2 References.

Fluxx has been in business for 15 years providing grant management software and implementation services. We have provided references in Section II.

1.2 Introduction and Background

Wayne RESA, established by the Michigan Legislature in 1960, is the largest of fifty-six (56) such agencies throughout the state. The Wayne RESA board is elected by one vote from each of the thirty-three (33) local Wayne County school district boards. WRESA provides a wide variety of services to thirty-three (33) public school districts and approximately ninety-seven (97) public school academies in Wayne County, Michigan; serving more than 260,000 students. WRESA, through various consortium arrangements, provides a variety of services to other educational agencies throughout the state of Michigan.

1.3 Scope of Work

Wayne RESA is seeking proposals from qualified vendors for a Grant Management Database System. The system must streamline the grant lifecycle, from application submission to financial tracking, compliance management, and reporting. It must be scalable, secure, user-friendly, and capable of handling the increasing volume of grants and users over time. This system includes, but is not limited to, design and implementation of a comprehensive cloud-based solution for Wayne RESA. The system will facilitate grant tracking, budget management, document management, compliance monitoring, reporting and analytics, and collaboration tools. The project will focus on enhancing efficiency, transparency, and compliance while addressing the unique challenges faced by Wayne RESA in managing grants.

Proposer Response:

Please confirm your understanding by checking Yes or No.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
---	-----------------------------

1.3.1 Specifications and Requirements

Fluxx has provided our complete Attachment B - Specifications & Requirements as a separate attachment with this submission.

1.4 Statewide Cooperative Contract

Wayne RESA is working with the Michigan Association of Counties CoPro+ program on this bid solicitation. If your bid meets the minimum qualifications, is responsive and responsible and offers competitive pricing you may be considered and approached to extend a term agreement and pricing to other public entities within the county, the region, and the state, in accordance with Michigan Compiled Laws 124.504. This process is called “piggybacking”; it offers tremendous value to public ordering entities regarding the cost and time to manage an end-to-end purchasing event. This process also offers exceptional value to selected vendors in terms of their company’s resources and time to respond to multiple solicitations from various public entities who have a similar need for their products or services.

All pricing submitted to Wayne RESA and its participating entities shall include a **2% administrative fee** to be remitted to CoPro+ by the contractor on a quarterly basis. Administrative fees will be paid against actual sales volume for each quarter. It is the contractor’s responsibility to keep all pricing up to date and on file with Wayne RESA/CoPro+. All price changes shall be presented to Wayne RESA/CoPro+ for acceptance, using the same format as was accepted in the original contract.

Proposer Response:

Please confirm your understanding by checking Yes or No.

<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
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1.5 Subcontractor

Please indicate the names, addresses and degree of utilization of any and all subcontractors which would be used in the performance of this Contract. Any person or vendor undertaking a part of the work under the terms of the contract, by virtue of an agreement with the Proposer, must receive the approval of the designated WRESA staff prior to any such undertaking. WRESA may terminate the contract if subcontracting is done without this approval.

Proposer Response:

Fluxx will not be leveraging subcontractors for this implementation.
--

1.6 Service Capabilities

1.6.1 **Communication Plan/Contract Management**

Proposer must identify their company standards of communication as they relate to contract performance, issue management, and change management. An issue is an identified event that, if not addressed, may affect schedule, scope, service, delivery, quality, or budget. A change is identified as a change in corporate leadership, structure, merger or acquisition.

Proposer Response:

Contract Performance: Describe how your company maintains communication to ensure the project stays on schedule, within scope, and aligned with expectations.

Fluxx ensures successful project execution through a structured, collaborative onboarding approach guided by the **Blueprint Workbook**, a foundational project planning and configuration document. Developed during early onboarding workshops, the Blueprint Workbook captures all agreed-upon requirements, workflows, and system configurations and serves as the central reference throughout implementation.

To manage tasks, track schedules, and ensure accountability, Fluxx uses **Rocketlane**, a purpose-built project management and collaboration platform. Rocketlane enables real-time visibility into deliverables, deadlines, roles, and progress across all implementation phases. Clients have full access to Rocketlane, allowing them to monitor milestones, review task statuses, and communicate with their Fluxx team through a centralized dashboard.

Regular check-ins and working sessions are scheduled to review completed work against the Blueprint, confirm configuration alignment, and make adjustments as needed. This structured methodology ensures the project stays on schedule, remains within scope, and continuously aligns with client expectations.

Issue Management: Outline your process for identifying, addressing and resolving issues that impact the schedule, budget or quality.

Fluxx follows a proactive, ITIL-aligned incident and problem management process using its Jira ticketing system. Issues are triaged by severity and priority, with defined Service Level Agreements (SLAs) in place for response and resolution:

- Priority 1 (critical) issues receive a 1-hour response.
- Priority 2 receives a 4-hour response.
- Lower priority issues are addressed within 48 business hours.

Fluxx provides full transparency through ticket tracking, incident audit logs, and escalation paths to ensure timely resolution. Clients also benefit from impersonation tools for real-time troubleshooting, structured workflows for follow-up tasks, and automated system alerts that inform users of issue statuses.

All configurations, updates, and issue resolutions are logged in the system’s audit trail for accountability and compliance.

Change Management: Explain your approach to handling significant organizational changes to ensure continuity during the contract.

Fluxx’s change management approach is designed to ensure continuity, reduce risk, and drive **user adoption** throughout the lifecycle of the contract. At the foundation of this strategy is the **Blueprint Workbook**, a living document that captures all agreed-upon configurations, workflows, and requirements. It serves as the guiding reference for evaluating and implementing any future changes to the system.

To support safe and effective change implementation, Fluxx provides a **dedicated sandbox (pre-production) environment**, where updates to configurations, workflows, or integrations can be thoroughly tested before being deployed to the live production environment. This allows internal teams to validate changes, conduct training, and ensure stakeholder buy-in without disrupting operations.

Fluxx also prioritizes training and continuous learning to support adoption at every stage:

- **Fluxx University** offers on-demand, self-paced courses, videos, and certification modules tailored to different user roles.
- **Instructor-led training** is delivered during onboarding and can be customized for specific use cases or new features post-launch.
- The **Fluxx Community** provides a collaborative space for users to ask questions, share insights, and learn from peers across hundreds of grantmaking organizations.

For ongoing support, Fluxx clients have access to a responsive team via the **Jira ticketing system**, where change-related questions or configuration requests can be submitted, tracked, and resolved efficiently.

Together, these components—sandbox testing, comprehensive training resources, and continuous support—create a resilient and user-centered change management framework that ensures successful adoption and long-term system value.

1.6.2 Primary Account Representatives

Proposer must identify by name, email address, and phone number for the following:

1. Contract performance – Single point of contact to troubleshoot any and all potential problems or issues.
2. Contract documents – Responsible for signing and negotiating Contract.
3. Reports – Responsible for reports.

Proposer Response:

1. Contact person’s name, email address, and phone number for Contract performance: Fluxx has more than nearly 30 employees in Customer Excellence. Based on Wayne RESA’s Go-Live date, a Customer Success Manager will be assigned to you.
2. Contact person’s name, email address, and phone number for Contract documents: Steven Lucas, Sr Account Executive | Email: steven.lucas@fluxxlabs.com | Phone: (415) 722-2405
3. Contact person’s name, email address, and phone number for reports: Your designated Customer Success Manager will be responsible for reports.

1.6.3 Key Personnel

Proposer must identify Key Personnel assigned to the project, including resumes and an organizational chart showing roles and responsibilities.

Proposer Response:

Please list the name(s) of Key Personnel and their job titles. Be sure to include their resumes as a separate, combined attachment titled, “Resumes”
 Please either submit your company’s organizational chart as a separate attachment titled, “Exhibit 2 – Org Chart” or paste a copy in this Proposer Response Box.

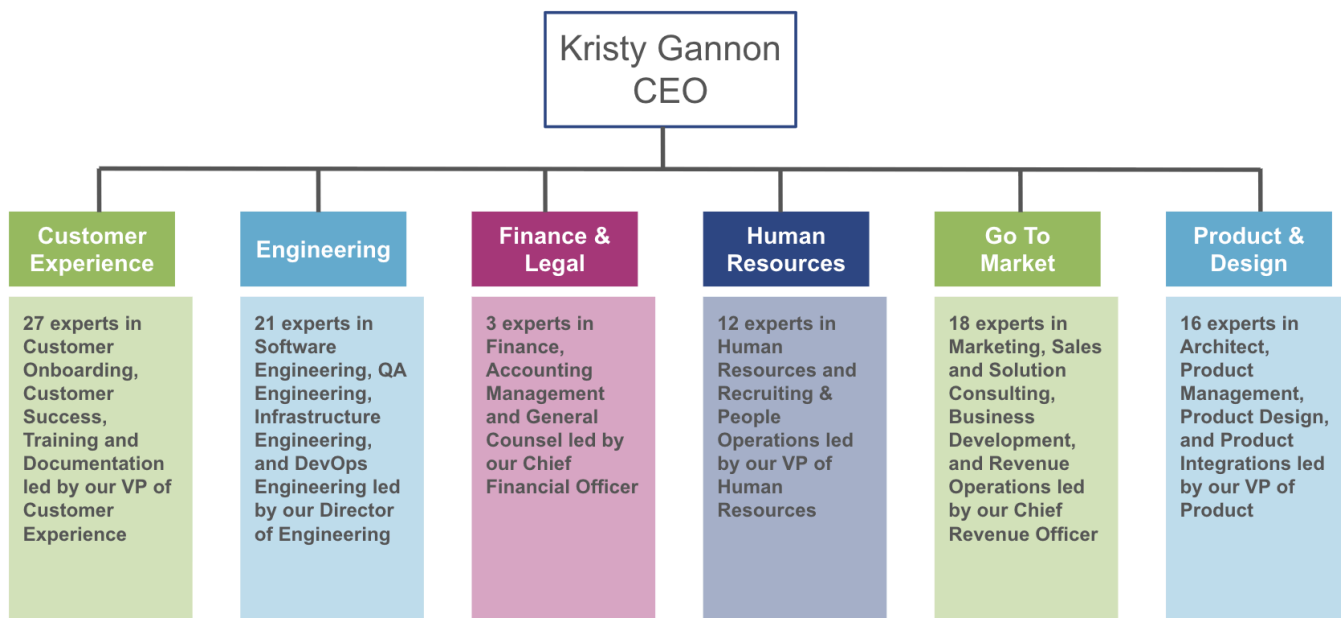
Key Personnel

Emily Mumford - Project Oversight
 Ismail Abbas - Sr. Data Specialist
 Katy Ajer - Senior Implementation Specialist

Fluxx has provided these resumes as a separate attachment titled “Resumes” as requested.

Company Organizational Chart

Fluxx staffs more than 80 professionals in Wayne RESA Experience, Engineering, Product and Design, and more. Fluxx understands that a software is only as good as its adoption rate, which is why Fluxx has invested in our Wayne RESA Excellence teams by more than 35% over the past three years. This initiative and driven user adoption and a vibrant Wayne RESA community where new ideas, processes, workflows, etc. are cross-shared across various users.



1.7 Wayne RESA Service

It is preferred that the Proposer have an accessible Wayne RESA service department with an individual specifically assigned to Wayne RESA. Wayne RESA inquiries should be responded to with forty-eight (48) hours or two (2) business days unless it is an emergency issue. Describe your company’s Wayne RESA Service Department (hours of operation, number and location of service centers, regular and emergency response times, etc.).

Proposer Response:

Wayne RESA Service Contact: A Customer Success Manager will be assigned prior to your Go-Live.
 Wayne RESA Service Phone#: Please see above.
 Hours of Operations: Support is available from 4:00 a.m. to 9:00 p.m. Eastern Standard Time, Monday through Friday (excluding US holidays).
 Address: Fluxx’s Customer Excellence Team is remote-only and US based.

Regular Response Times: To help our customers in the most efficient manner, our support team has a priority response system that helps to ensure that the most critical support events are handled in a timely manner. We have four levels of response time, depending on the nature of the requests. These response times range from under 1 hour for priority one requests to within 48 hours for priority four requests.

Emergency Response Times: Priority one issues are covered by our on-call Support team within an hour; all other issues are reviewed by priority the following business day based on response levels.

1.8 Purchase Orders

Requests for quotes will be initiated by participating agencies as specific needs arise. Participating agencies will issue individual detailed specifications to the pre-qualified vendor pool along with specific response information required, deliverables, and any special terms and conditions. The vendors will respond directly to the requesting agency within the timeframe specified in the request for quote. The participating agency will evaluate the responses and determine the Proposer that will be awarded a purchase order (PO). Resulting orders are to be shipped and billed directly to these institutions.

Proposer Response:

Please confirm your understanding by checking Yes or No.

Yes No

1.9 Delivery and Acceptance

The awarded Proposer (Contractor) shall deliver all materials, products, and services per the agreed schedule. Physical materials must be securely packaged and shipped FOB destination, while digital resources must be provided via secure electronic transfer. The Contractor bears all shipping, handling, and packaging costs. Risk of loss remains with the Contractor until final acceptance by WRESA.

Acceptance is contingent upon:

- Conformance to requirements (materials, software, and services meet standards).
- Successful training and implementation as per the Contract.
- Functionality of digital components and system integrations.

If deficiencies are found, the Contractor must correct them within five (5) business days at no additional cost. Non-compliance may result in rejection, withheld payment, or Contract termination if unresolved.

Proposer Response:

We do not anticipate equipment delays, as our solution is 100% SaaS-based and hosted on scalable, reliable cloud infrastructure. Fluxx provides a Scope of Work to be mutually agreed upon during contracting.

1.9.1 Invoice and Payments

All pricing must reflect net 30 payment terms.

Proposer Response:

All pricing must reflect net 30 payment terms. Agree? XYes or No

Fluxx payment terms are set forth in the order form and are NET 30.

1.10 Criminal Background Check

WRESA is committed to providing a safe and secure environment for all staff, students, and clients that conduct business or visit any WRESA operated campus. Prior to any individual servicing WRESA operated campuses, a criminal history records check shall be conducted in accordance with state law. Individuals seeking access to WRESA operated campuses will be held to a similar standard of review as WRESA employees and contractors, including the requirement that any criminal conviction will require the individual to provide requested documentation so that WRESA can conduct a targeted review and individualized assessment. Background checks must be fully completed prior to starting work on any WRESA campus, and only individuals authorized in writing by Wayne RESA utilizing a DETERMINATION FOR ASSIGNMENT form will be accepted as qualified for placement.

Proposer will be responsible for working with WRESA to run proper background checks. WRESA will process background checks for a fee of seventy-five dollars (\$75.00) for each CHRI record initiated by the Proposer. The Proposer is responsible for all processing costs and fees associated with background checks, including WRESA processing fees. Wayne RESA shall issue an invoice to the Proposer detailing the fees owed to Wayne RESA during each month of the Term. The Proposer must remit payment within thirty (30) days of receipt of such invoice. Any invoices unpaid after that thirty (30) day period shall be deducted from amounts due from WRESA to the Proposer.

1.11 Pricing Schedule

Respondents will provide pricing information on the price sheet (**Attachment A**) that will be utilized when evaluating price competitiveness.

Fluxx has provided the price sheet (Attachment A) as a separate attachment to this submission.

1.11.1 RESERVED

1.11.2 Bid Pricing

Proposers have the option to provide high-volume pricing. Proposers who offer high-volume pricing may be evaluated more favorably than those who do not. Proposers should specify this discount option within their cost proposal and at what level.

1.11.3 Quantity Term

Proposer agrees to supply the complete quantity and products that each Wayne RESA requires.

1.11.4 Tax Excluded from Price

- (a) Sales Tax: Wayne RESA and local units of government are exempt from sales tax for direct purchases. The Proposer's prices must not include sales tax.

(b) Federal Excise Tax: Wayne RESA may be exempt from Federal Excise Tax, or the taxes may be reimbursable, if articles purchased under any resulting Contract are used for Wayne RESA's exclusive use. Certificates showing exclusive use for the purposes of substantiating a tax-free, or tax-reimbursable sale will be sent upon request. If a sale is tax exempt or tax reimbursable under the Internal Revenue Code, the Proposer's prices must not include the Federal Excise Tax.

Proposer Response:

Include any comments regarding pricing, discounts being offered, and information on other cooperative contracts held by respondent.

Due to the volume of grants managed by WRESA, Fluxx has provided a ~22% discount on products with annual software licensing relative to our MSRP. *Pricing is scalable to accommodate consortia and multi-agency deployments.*

1.12 Price Assurance

The awarded Proposer agrees to provide pricing to Wayne RESA and its participating entities that are the lowest pricing available, and the pricing shall remain so throughout the duration of the contract. The awarded Proposer agrees to promptly lower the cost of any product purchased through Wayne RESA following a reduction in the manufacturer or publisher's direct cost. If respondent has existing cooperative contracts in place, Wayne RESA requests equal or better than pricing to be submitted.

All pricing submitted to Wayne RESA shall include a 2% administrative/remittance fee to be remitted to CoPro+ by the awarded Proposer. It is the awarded Proposer's responsibility to keep all product listings up to date and on file with Wayne RESA/CoPro+.

Proposer Response:

Please confirm your understanding by checking Yes or No.

Yes No

If "NO" was answered on any item in this RFP, please explain:

SECTION 2.0 – PROPOSER INFORMATION AND ACCEPTANCE

1. The undersigned declares that the bid documents, including, without limitation, any RFP Addenda and Exhibits have been read.

The undersigned is authorized, offers, and agrees to furnish the articles and/or services specified in accordance with the Specifications, Terms & Conditions of the bid documents of this RFP.

2. The undersigned has reviewed the bid documents and fully understands the requirements in this bid and that each proposer who is awarded a contract shall be, in fact, a prime contractor, not a subcontractor, and agrees that its bid, if accepted by Wayne RESA, will be the basis for the Proposer to enter into a contract with Wayne RESA in accordance with the intent of the bid documents.
3. The undersigned acknowledges receipt and acceptance of all addenda.
4. The undersigned agrees to the following terms, conditions, certifications, and requirements listed in Section 2.3:
 - Contractor’s Employment Eligibility
 - Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion
 - Certification Regarding Nondiscrimination Under Federally and State Assisted Programs
 - Assurance Regarding Access to Records and Financial Statements
 - Iran Economic Sanctions Act
 - Certificate of Independent Price Determination
 - Certifications/Disclosure Requirements Related to Lobbying
 - U.S. Department of Energy Assurance of Compliance Non-Discrimination in Federally Assisted Programs
5. The undersigned acknowledges that proposer will be in good standing in the State of Michigan, with all the necessary licenses, permits, certifications, approvals, and authorizations necessary to perform all obligations in connection with this RFP and associated bid documents.
6. It is the responsibility of each proposer to be familiar with all of the specifications, terms and conditions and, if applicable, the site conditions. By the submission of a bid, the proposer certifies that if awarded a contract they will make no claim against Wayne RESA based upon ignorance of conditions or misunderstanding of the specifications.
7. Patent indemnity: Vendors who do business with the Wayne RESA shall hold Wayne RESA, its officers, agents and employees, harmless from liability of a nature or kind, including cost and expenses, for infringement or use of any patent, copyright or other proprietary right, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract or purchase order.
8. Insurance certificates are not required at the time of submission. However, if awarded, the Contractor agrees to meet the minimum insurance requirements posted in the terms and conditions. This documentation must be provided to Wayne RESA, prior to award, and shall include an insurance certificate and additional insured certificate, naming Wayne RESA, which meets the minimum insurance requirements, as stated in the terms and conditions.

2.1 Company Profile

Company Profile
Official Company Name of Proposer: Fluxx Labs, Inc.
Street Address: 2261 Market Street #4060
City: San Francisco
State: CA Zip Code: 94114
Website: www.fluxx.io
Primary Contact Name: Steven Lucas, Senior Account Executive
Primary Contact Phone Number: 737-267-0643
Primary Contact Email Address: steven.lucas@fluxxlabs.com
Dun & Bradstreet (D&B) Number (if applicable): N/A
Has your company been debarred by the Federal and/or State Government? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If yes, has it been lifted and if so, when?</i>
Have you ever been in bankruptcy or in reorganization proceedings? No, Fluxx has not been in bankruptcy or reorganization proceedings.
<p>Brief history of your company, including the year it was established: Fluxx Labs, Inc. ("Fluxx") was founded in 2010 with a singular mission: to revolutionize the world of giving and impact through the most innovative and connected platform imaginable. Our story began by listening—intently. Our team spent countless hours alongside foundation staff, observing their workflows, frustrations, and needs. What we saw was eye-opening: piles of papers scattered across desks, each representing a step in the grantmaking process—signing, reviewing, approving. These piles became the inspiration for our signature Fluxx card-based interface, a game-changing design that simplifies workflows and empowers users.</p> <p>Fluxx's intuitive, Kanban-inspired interface is at the heart of what makes our platform so transformative. Designed to visualize workflows, maximize efficiency, and streamline decision-making, Fluxx uses a card-and-filter system that enables users to easily manage tasks and track progress. Dashboards are configurable and tailored to roles, empowering users to filter and act on items like grants, budgets, contacts, and projects.</p> <p>The platform also offers:</p> <ul style="list-style-type: none"> ● Advanced data visualizations to highlight trends and insights ● Robust search and filter tools for personalized data views ● Real-time updates for seamless collaboration and task management

Company Profile

- **On-demand qualitative and quantitative reporting**, using a mix of canned reports, cards, and custom visualizations

From these roots of empathy and innovation, Fluxx emerged as a leader in cloud-based grantmaking solutions. As one of the first to offer a cloud platform for grants management, Fluxx quickly gained momentum, earning the trust of some of the most respected organizations in government and philanthropy. Today, our thriving community includes over **400 grantmaking organizations worldwide**, spanning government agencies, nonprofits, medical research institutions, corporations, and private and family foundations. Fluxx is a trusted partner to U.S. and international private foundations, community foundations, public charities, and government agencies at every level.

Signature: *Ashley R Boyer*

Name and Title of Signer: Ashley Boyer, Chief Revenue Officer

Date: 6/23/2025

2.2 References

Provide a minimum of three (3) Wayne RESA references for commodities and/or services of similar scope dating within the past three (3) years. Please identify any experience relevant to the services you propose to provide through this RFP within the Scope of Work:

Entity Name: ECMC Foundation	
Contact Name: Jess Diep	Title: Grants Administration Manager
City: Minneapolis	State: MN
Phone Number: 651-221-0566 ext 5113	Years Serviced: 10+ (2015 - Present)
Description of Services: Fluxx Grantmaker software and implementation	
Annual Volume: \$100M in granting annually through Fluxx	

Entity Name: New Zealand Department of Internal Affairs	
Contact Name: Ervey Leos	Title: Grants Director
City: Wellington	State: NZ
Phone Number: +64 27 304 1729	Years Serviced: 10+ (2013-Present)
Description of Services: Fluxx Grantmaker software and implementation	
Annual Volume: \$100M in granting annually through Fluxx	

Entity Name: Denver Scientific and Cultural Facilities District	
Contact Name: Jessica Kato	Title: Deputy Director
City: Denver	State: CO
Phone Number: 303-860-0588 ext 111	Years Serviced: 5+ (2020 - Present)
Description of Services: Fluxx Grantmaker software and implementation	
Annual Volume: Managing more than \$85M in granting annually through Fluxx	

2.3 Assurances and Certifications

CONTRACTOR’S EMPLOYMENT ELIGIBILITY

By entering the contract, Contractor warrants compliance with ARS subsection 41-4401, ARS subsection 23-214, the Federal Immigration and Nationality Act (FINA), and all other federal immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws. Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The Proposer complies and maintains compliance with FINA, ARS 41-4401 and 23-214 which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the Wayne RESA Participating entities in which work is being performed.

<u>Ashley Boyer, Chief Revenue Officer</u> Printed Name of Respondent	<u><i>Ashley K Boyer</i></u> Signature of Respondent
<u>Fluxx Labs, Inc.</u> Company Name	<u>6/23/2025</u> Date of Signature

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion

The prospective contractor certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded for from participating in this transaction by any Federal department of agency. Where the prospective contractor is unable to certify to any of the statements in this certification, such prospective contractor shall attach an explanation to this proposal.

Certification Regarding Nondiscrimination Under Federally and State Assisted Programs

The applicant hereby agrees that it will comply with all federal and Michigan laws and regulations prohibiting discrimination and, in accordance therewith, no person, on the basis of race, color, religion, national origin or ancestry, age, sex, marital status or handicap, shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise be subjected to discrimination in any program or activity for which it is responsible or for which it receives financial assistance from the U.S. Department of Education or the MDE.

Assurance Regarding Access to Records and Financial Statements

The applicant hereby assures that it will provide the pass-through entity, i.e., the Wayne County Regional Educational Service Agency, and auditors with access to the records and financial statements as necessary for the pass-through entity to comply with 2 CFR, Part 200, Subpart F and Compliance Supplement for the U.S. Department of Education.

Iran Economic Sanctions Act

The prospective contractor certifies that its organization, by submission of this proposal, is not an Iran Linked Business. Please refer to the “Iran Economic Sanction Act” Public Act 517 for clarifications or questions. Wayne RESA as a Michigan public entity is required to follow Public Act 517 of 2012.

Proposer Signature: <i>Ashley R. Boyer</i>
Date: 06/23/2025 06/24/2025 <i>7/1/25</i>

Notary	
State of	<u>Pennsylvania</u>
County of	<u>Beaver</u>
Sworn to and subscribed before me, a notary public in and for the above state and county, on this <u>24th</u> day of <u>June</u> , 20 <u>25</u> .	
Notary Public	<i>Michael J Webb</i> MICHAEL J WEBB
My commission expires: 11/08/2025	

Commonwealth of Pennsylvania - Notary Seal
 MICHAEL J WEBB, Notary Public
 Allegheny County
 My commission expires November 8, 2025
 Commission Number 1290457

Notarized remotely online using communication technology via Proof.

CERTIFICATE OF INDEPENDENT PRICE DETERMINATION

- (A) By submission of this offer, the offeror certifies each party thereto certifies as to its own organization, that in connection with this procurement:
- (1) The prices in this offer have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting completion, as to any matter relating to such prices with any other offeror or with any competitor;
 - (2) Unless otherwise required by law, the prices which have been quoted in this offer have not been knowingly disclosed by the offeror and will not knowingly be disclosed by the offeror prior to bid opening in the case of an advertised procurement or prior to award in the case of a negotiated procurement, directly or indirectly to any other offeror or to any competitor; and
 - (3) No attempt has been made or will be made by the offeror to induce any person or firm to submit or not to submit an offer for the purpose of restricting competition.
- (B) Each person signing this offer on behalf of the manufacturer or processor certifies that:
- (1) He or she is the person in the offeror’s organization responsible within the organization for the decision as to the prices being offered herein and has not participated, and will not participate, in any action contrary to (A)(1) through (A)(3) above; or
 - (2) He or she is not the person in other offeror’s organization responsible within the organization for the decision as to the prices being offered herein, but that he or she has been authorized in writing to act as agent for the persons responsible for such decision in certifying that such persons have not participated and will not participate, in any action contrary to (A)(1) through (A)(3) above, and as their agent does hereby so certify; and he or she has not participated, and will not participate, in any action contrary to (A)(1) through (A)(3) above.

To the best of my knowledge, this manufacturer or processor, its affiliates, subsidiaries, officers, directors, and employees are not currently under investigation by any governmental agency and have not in the last three years been convicted or found liable for any act prohibited by State or Federal law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract, except as follows:

Ashley Boyer, Chief Revenue Officer

 Company’s Authorized Representative / Position Title

Ashley R Boyer

 Signature of Company Representation

Fluxx Labs, Inc.

 Company Name

6/23/2025

 Date of Signature

CERTIFICATIONS/DISCLOSURE REQUIREMENTS RELATED TO LOBBYING

Section 319 of Public Law 101-121 (31 U.S.C.), signed into law on October 23, 1989, and imposes new prohibitions and requirements for disclosure and certification related to lobbying on recipients of Federal contracts, grants, cooperative agreements, and loans. Certain provisions of the law also apply to Federal commitments for loan guarantees and insurance; however, it provides exemptions for Indian tribes and tribal organizations.

Effective December 23, 1989, current and prospective recipients (and their subtier contractors and/or subgrantees) will be prohibited from using Federal funds, other than profits from a Federal contract, for lobbying Congress and any Federal agency in connection with the award of a particular contract, grant, cooperative agreement, or loan. In addition, for each award action in excess of \$100,000 (or \$150,000 for loans) on or after December 23, 1989, the law requires recipients and their subtier contractors and/or subgrantees to: (1) certify that they have neither used nor will use any appropriated funds for payment to lobbyists; (2) disclose the name, address, payment details, and purpose of any agreements with lobbyists whom recipients or their subtier contractors or subgrantees will pay with profits or non-appropriated funds on or after December 23, 1989; and (3) file quarterly updates about the use of lobbyists if material changes occur in their use. The law establishes civil penalties for noncompliance. If you are a current recipient of funding or have an application, proposal, or bid pending as of December 23, 1989, the law will have the following immediate consequences for you:

You are prohibited from using appropriated funds (other than profits from Federal contracts) on or after December 23, 1989, for lobbying Congress and any Federal agency in connection with a particular contract, grant, cooperative agreement or loan; You are required to execute the attached certification at the time of submission of an application or before any action in excess of \$100,000 is awarded; and You will be required to complete the lobbying disclosure form if the disclosure requirements apply to you.

Regulations implementing Section 319 of Public Law 101-121 have been published an Interim Final Rule by the Office of Management and Budget as Part III of the February 26, 1990, Federal Register (pages 6736-6746).

CERTIFICATION REGARDING LOBBYING CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge and belief, that:

No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of any Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement;

If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;

The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Ashley Boyer, Chief Revenue Officer



Company's Authorized Representative / Position Title

Signature of Company Representation

Fluxx Labs, Inc.

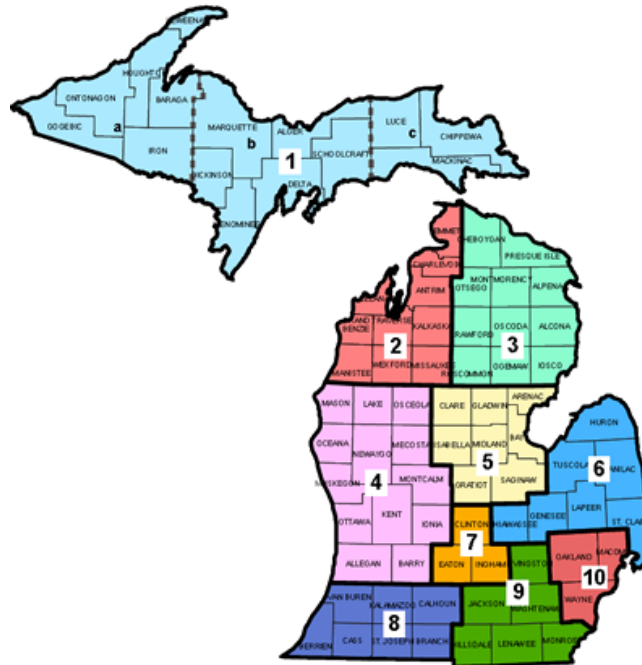
6/23/2025

Company Name

Date of Signature

Appendix A - Regional Map

APPENDIX A – Regional Map



1. Upper Peninsula
2. Northwest
3. Northeast
4. West
5. East Central
6. East
7. South Central
8. Southwest
9. Southeast
10. Detroit Metro

Proposer Response:

Please list which Regions you will service.

Fluxx can service all Regions located on the Appendix A Map.

Appendix B - Additional Software Features

Fluxx delivers a feature-rich, highly configurable grant management system that far surpasses other vendors by offering unlimited users and data storage, seamless automation, and a purpose-built Grantee Portal—all at no extra cost. With robust security, real-time reporting, workflow customization, and an intuitive admin panel that empowers organizations to make no-code changes, Fluxx ensures efficiency, compliance, and scalability without reliance on expensive consultants.

Standard Features

Information Security: These following features are included in our base subscription. Our cloud-based system is securely hosted on AWS, which holds a range of recognized certifications and standards, including **East/West FedRAMP Moderate certified, ISO 27001 and NIST 800-53. AWS consistently releases SOC 1 Type 2 and SOC 2 reports.** In addition to AWS's credentials, **Fluxx itself is proud to hold the SOC 2 Type 2 certification.**



At Fluxx, our commitment to information security ensures that client data and IT systems remain shielded from risks such as theft, loss, misuse, damage, or unauthorized access. Every user plays a vital role in safeguarding the data they work with, upholding its confidentiality, integrity, and availability. Cybersecurity measures include regularly updated firewall rules, cipher suites, and certificates. Moreover, we ensure that data, whether at rest or in transit, is encrypted using TLS. This ethos of security and compliance is shared across all our team members, from our IT specialists to our management

Users and Data Storage: Fluxx is one of the only platforms that allows unlimited users and data storage in the system. **We do not charge based on “seats”, “users”, etc. and you do not have to worry about buying additional data to support your programs now or any additional programs.**

Due Diligence & Compliance: The system integrates comprehensive compliance checks and validation rules directly into the application process, ensuring that all submissions meet the necessary legal and operational standards specific to each grant type. Additionally, Fluxx automates validations to reduce errors and ensure data integrity. This includes checks for completeness, eligibility, and adherence to funding criteria specific to each grant type, minimizing the risk of compliance issues.

Budget Tracking & Reporting: Fluxx provides various ways to track budget and funding sources.

Workflow Automation: Fluxx supports dynamic workflows that can be easily adjusted to match the operational nuances of different types of grants. This includes setting specific approval paths, review stages, and compliance checks relevant to each grant type.

During the onboarding process, Fluxx's team works closely with Wayne RESAs to map out their existing workflows and identify areas for streamlining. Fluxx configures custom workflows that eliminate inefficiencies and automate repetitive tasks. This ensures that grantmaking processes are more efficient and aligned with industry standards.

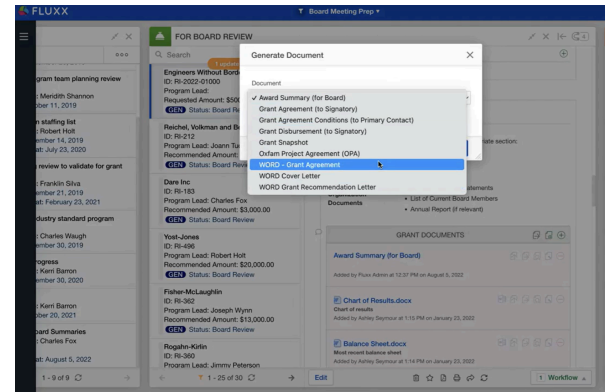
Document Management: Fluxx has robust template management capabilities that can tie directly into the grant and payment processes. We can configure the auto-creation of single or bulk documents to render using structured data in each application. These documents can include conditional logic to help consolidate multiple offline templates into a single auto-generated document. Workflow can be attached to Agreements.

These documents can be created and managed in two ways: 1) within the Fluxx letter builder or 2) in Microsoft Word using the Word plug-in. These options give the Admin users absolute control of letter templates and allow

for any standard formatting, such as headers, colors, tables, etc., to generate formatted documents. The Fluxx Document Sync (also known as Word-Edit-in-Place) allows working versions of Word documents to be synced back to Fluxx without manually uploading files. A Fluxx Add-In powers the integration for Microsoft Word that uploads the most recent version of the document when the user clicks “Sync to Fluxx.”

This allows users to modify documents case-by-case and resave information as needed.

Fluxx accommodates a wide range of document formats, including Word documents, Excel spreadsheets, PDFs, and video and audio files. Users can upload, download, and view these files directly on the platform. Additionally, Fluxx allows for version control, letting users store and track multiple versions of a document, whether they're sent to or received from the funding organization.



Configurable Notifications & Alerts: Fluxx offers various messaging capabilities, including automated email notifications, in-app messaging for real-time communication among users, and visual cues on records/dashboards to streamline collaboration and ensure timely updates within the grant management process. Users can be assigned through the configured workflow and also users can “subscribe” to notifications via the card interface.

Customizable Features

Fluxx is one of the most configurable grant management software on the market. The following are features that are regularly used and configurable:

- **Custom Grant Workflows** – Organizations can define approval processes, compliance checkpoints, and decision paths.
- **Role-Based Access Control** – Different permissions for administrators, reviewers, and grantees.
- **Dynamic Application Forms** – Forms can include conditional branching, custom data fields, and applicant-specific sections.
- **Scoring & Review Process** – Configurable review scoring methodologies, panel review options, and automated workflows.
- **Grantee Portal Customization** – Organizations can modify portal settings, application tracking, and reporting tools.
- **Budget & Financial Workflows** – Set up funding sources, sub-categories, contingency tracking, and multi-year budgeting.
- **Automated Reporting & Analytics** – Pre-built and ad-hoc reporting dashboards to track KPIs, trends, and financial data.
- **Letter & Contract Templates** – Merge data into pre-configured contract and correspondence templates.
- **Payment Tracking & Disbursement** – Configurable deliverable-based payment scheduling and tracking.
- **Eligibility Quiz & Pre-Screening** – Custom eligibility screening before applicants access the full application.

Unique Features

AI Capabilities: Fluxx leverages generative AI to simplify and enhance grant management, across the grant lifecycle with transformative features:

Application Summaries: Quickly distill complex application data into clear, actionable insights, enabling faster, more informed decisions.

Organization Summaries: Access key details about grantee organizations, their history, and relationships to streamline vetting and partnership processes.

Grantee Report Summaries: Extract critical updates from progress reports to stay informed quickly.

Payment Summaries: Gain instant clarity on payment statuses, amounts, and timelines, ensuring efficient financial management.

Amendment Summaries: Review changes and their implications in seconds, reducing administrative burden while maintaining oversight.

Document Summaries: Quickly extract key details from lengthy PDFs and documents to identify relevant information faster, saving time while still enabling deeper reviews when needed.

Summaries are designed for simplicity—view them on the record or copy them with one click to use in reports, board summaries, presentations, or collaboration tools. These AI-driven tools turn complex data into clear, actionable insights, freeing you to focus on strategic priorities.

Looking ahead through 2025, Fluxx is advancing AI-driven features to elevate grant management and working on the following:

Enhanced Summaries: Expanding capabilities based on user needs.

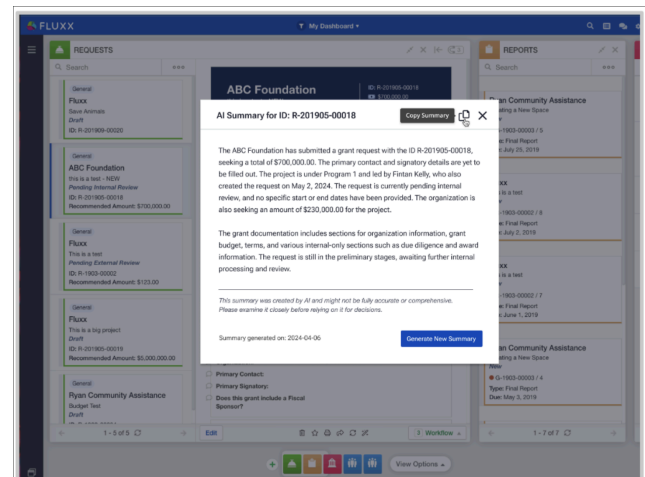
Grant Data Interactions: Enabling dynamic two-way interaction, analysis and visualization of grant information.

AI-Powered Help Chatbots: Providing personalized, real-time assistance for our community's unique needs.

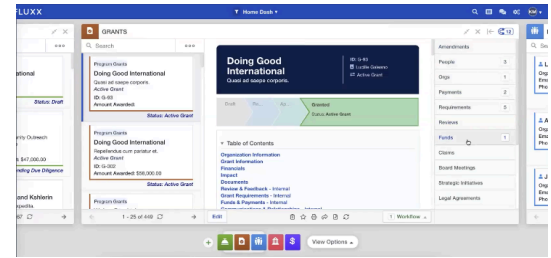
At Fluxx, we believe AI has the power to transform grantmaking responsibly. Our initiatives are built on a foundation of transparency, security, and ethical use, ensuring:

- **Opt-in Features:** Full control with opt-in functionality.
- **Data Usage:** Clear policies ensure your data is never used to train AI.
- **Bias Mitigation:** Designed for fair and equitable outcomes.

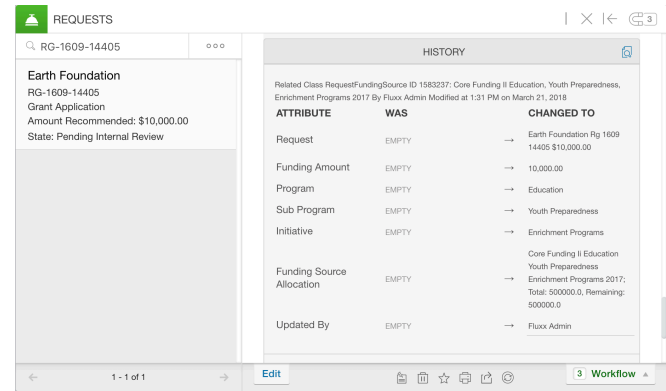
Our human-centered approach ensures Fluxx AI enhances operations without compromising control or trust. Seamlessly integrated into your workflows, these tools help you work smarter, streamline processes, and focus on your mission. Fluxx AI empowers organizations to achieve greater impact through smarter, data-driven decisions while maintaining fairness and integrity across every aspect of grant management.



Connected Data: Users can access a grant or organization history in one-click, using our Connected Data functionality which gives access to all current and historical proposals, grants, reports and payments associated with one record – and without having to leave the screen to do so! Fluxx’s interface helps users to understand the full relationship of activities.

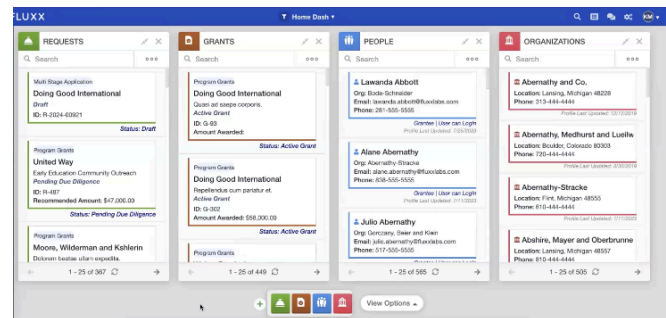


Audit Trail & Compliance Tracking: Fluxx maintains an audit trail of all database records, documents, and transactions (add, change, delete) identifying the individual performing the action, the date and the time, and the original data in instances where changes are made. All updates and changes to data are captured in the “History” section of each record. These can be viewed and referenced by all users.



Fluxx prominently displays Error, Validation, and Compliance Warnings at the top of the screen, quickly drawing users' attention to incomplete or incorrectly filled-out fields. These alerts point to areas in the application where mandatory fields or specific conditions are unsatisfied. To make correcting these issues easier, Fluxx includes a "jump to next error" feature that guides users directly to the issue area section of the form. By providing clear warnings and convenient navigation, Fluxx enhances data compliance and accuracy, helping users identify and rectify problems swiftly.

Card-Based User Interface: Fluxx is differentiated by a unique, intuitive user interface that makes collaboration, clarity, and organization of data effortless. Large and small foundations, nonprofits, government agencies, and corporations are dramatically shortening their grant cycles and making more strategic decisions with Fluxx. The interface is akin to a "Kanban Board" and is designed to help visualize work, filter work-in-progress, and maximize efficiency (or flow). Fluxx uses cards and filters to display the various stages in the workflow and specifically for each user to display when they are required to take action on a record. These dashboards are all configurable and consist of user-defined filters on items such as Grants Management, Budgeting, Contact Management, and Project Management.



This card-based interface provides robust search and filter capabilities to narrow the data at an individual user level. The user can then apply unique visualizations of underlying data: list, detail, summary, spreadsheet, printable, and visualization views. Fluxx also leverages a proprietary mechanism for real-time updates that allow users to filter and interact with data to manage complex model relationships and workflows, and view insights. Additionally, qualitative and quantitative analysis can be generated on-demand, using cards and filters, canned reports, and visualization.

DocuSign & Microsoft Add-In: Fluxx provides pre-built integrations for contract signing and document automation that directly syncs with grant records.

DocuSign: Fluxx maintains bidirectional sync with DocuSign, enabling users to identify the correct signatories for approval and where signatures and action need to be taken. Once routed through DocuSign, notifications are sent to signatories, and signatures are captured. The Fluxx system alerts the internal Grants Team to the executed agreement, saved and referenceable on the grant record.

Microsoft: Fluxx can integrate with Microsoft Word, Excel, and Outlook.

- **Microsoft Word Add-in:** The Fluxx Word Add-In is a letter generation tool for Fluxx similar to the “Mail Merge” function in Microsoft Word. Fluxx administrators can create letter templates directly in Word, adding “Content Blocks” for fields and conditional statements that dynamically pull in content from Fluxx records.
- **Microsoft Excel Add-in:** Data reporting templates are created directly in Excel (with refreshable data feeds from Fluxx) to allow richly formatted reports, powerful Excel functionality into repeatable templates, multi-tab reports, rollup field calculations.
- **Microsoft Outlook Add-in:** Outlook Add-in that allows users to save emails to related records in their Fluxx Grantmaker instance. Once the Add-in is set-up, users simply click on the "Save to Fluxx" icon within Fluxx.
- **Microsoft Word Edit-in-Place:** The Fluxx Word Edit-in-Place allows users the ability to open and edit a document from within the Fluxx application and save it straight back into the Fluxx application by saving or saving and closing in Word rather than having to download the file, find and edit and then re-upload the file to the correct location separately. Reducing frustration and saving time.



Bulk Payment & Workflow Automation: Fluxx simplifies payment processing through our intuitive software. Fluxx offers tailored payment scheduling options to accommodate different grant management needs, streamlining traditional and reimbursement-based grant models.

For traditional grants, Fluxx simplifies the task of scheduling multiple future payments. Internal users who have the necessary permissions can set up a payment structure in two ways: (1) Manual Scheduling: Users can individually schedule payments at specific times, or (2) Bulk Payment Scheduler: For more routine payments, users can employ the bulk payment scheduler that uses relative date logic. This allows them to schedule regularly occurring and prorated payments to grantees at predetermined intervals. This capability is particularly useful for managing grants at a high volume, enabling users to create and arrange a series of structured future payments easily.

In contrast, the reimbursement model functions differently. Here, the contract award is determined upfront, but no payments are scheduled until explicitly requested by the recipient. Fluxx alters the payment configuration to include specific workflow steps to accommodate this. These steps require the recipient to submit the necessary information or an invoice for approval before processing payment. Once a reimbursed payment is approved and scheduled against the contract, the "Amount Left to Spend" automatically adjusts to reflect the remaining balance of the total contract value.

SSO Connector: Fluxx is able to integrate its application with a number of popular single sign-on solutions to allow users in an organization to use their existing user ID and password to achieve a seamless login experience to the Fluxx application. Fluxx supports SAML 2.0 standard authentication through various providers (such as Fluxx documented SSO providers of Okta, Azure, and Ping), which can and has been used to authenticate to SSO/Active Directory.