



DuPage County, IL | Community Services

RFP for Grant Management Software

May 16, 2025 | Presented by Neighborly Software





Cover Letter

May 16, 2025

DuPage County, IL | Community Services
421 North County Farm Road Wheaton, IL 60187

Dear Donna Weidman,

On behalf of Benevate LLC, I am pleased to submit our response to your Request for Proposal (RFP) for Grant Management Services. We understand that the County of DuPage ("County") Community Services Department is seeking a cloud-based software solution to manage and report on HUD grants, as well as eliminate any paper-based processes. As a configurable SaaS platform specifically designed to eliminate paper, manual processes and cumbersome reporting, the County will be able to maximize their community investment dollars and minimize their compliance risk.

Since our founding in 2016, Neighborly Software has cultivated strong relationships with cities, counties, and states across the country. Drawing upon this experience, we have developed a market-leading platform tailored for housing, economic, and community development programs. Our portfolio includes over 550 cities, counties, and other entitlements nationwide, **including the DuPage County Community Services Department, which has administered the Continuum of Care, Neighborhood Investment, Public Services & ESG, and Single Family Rehab programs through our platform since 2021.**

While other platforms offer generic business solutions that can be adapted or repurposed to fit housing, economic and community development needs, Neighborly Software has been purpose-built for state, city, and county officials to manage their Treasury, HUD, and other publicly and privately funded programs. Our commitment to this segment of the industry has allowed us to build our platform with a more robust range of system functionalities than any other solution on the market:

- **Grants Management** - turn-key solution to accept, review, and score grant applications, process subrecipient draw requests, submit accomplishment reports, and track funding and program income, all of which can be shown on a regional map.
- **Reporting** - create custom and ad hoc reports from any field in the system through three key features: out-of-the-box reports, our ad hoc report builder, and Snowflake's Data Warehouse.
- **Program Monitoring** - our comprehensive dashboards allow users to see the impact various programs are having across your community, in addition to providing multiple tools to identify and mitigate fraud.
- **Unique External-User Portal** - applications can be submitted through our convenient, intuitive online portal, which also allows for documents to be uploaded.
- **Tasks & Notifications** - allows users to track the status of tasks and receive notifications when tasks are completed or updated.



Neighborly Software

3423 Piedmont Rd. NE, Atlanta, GA 30305 | <https://neighborlysoftware.com> | 855-625-9738

We've built a solution that is highly flexible and configurable to specific client needs. Below are the differences between Neighborly Software and other generic software providers that will be interested in working with the County.

1. With a track record of facilitating the distribution of over \$12 billion dollars, our software has proven its ability to efficiently manage large and complex programs.

As the largest software provider of housing, economic, and community development programs, including the largest single solution leveraged for the ERA (Emergency Rental Assistance) program, Neighborly Software offers the County a trusted partner committed to maximizing the impact of their program efforts while upholding the highest standards of accountability and transparency.

2. Unlike many other software providers, we actively and continually invest in our IT solution to ensure that it meets the changing needs of HUD programs.

Much of our growth is due to our innovation, intuitive technology, and positive referrals from our clients.

3. The Neighborly Software Fraud Prevention Dashboard offers a comprehensive solution to mitigate fraudulent activities within applications.

Its intuitive interface presents vital metrics such as application fill-out time, enabling quick detection of anomalies indicative of fraudulent behavior. Additionally, it scrutinizes photos for alterations and flags duplicate email addresses and phone numbers, minimizing the risk of identity manipulation.

4. Housing, economic, and community development is a core function of Neighborly Software, and 'helping communities help people' is our mission; our team has extensive experience working in the public sector, specifically with HUD, Treasury, and other funded programs.

As such, the County wouldn't be getting a technology vendor trying to sell an expensive, custom-built, and lengthy IT project; instead, you'd be getting a committed and experienced partner that is focused on making this solution - and your program - a success.

Since the County already has a functioning portal with Neighborly Software, the implementation period would be drastically reduced, saving money and allowing you to serve your community sooner! With features tailored to the specific needs of your statement of work, our platform will empower you administer and report on all grant programs more efficiently.

Neighborly yours,



Jason Rusnak | President, Benevate LLC | 3423 Piedmont Rd. NE, Atlanta, GA 30305

jason.rusnak@neighborlysoftware.com | 855-625-9738

3) FIRM QUALIFICATIONS: Provide a statement that portrays the Bidder's qualifications in relation to the Scope of Services. The response should include the following:

a) A summary of the Bidder's general qualifications including specific disciplines represented that are applicable to the proposed work, number of employees, office locations, etc.

Founded in 2016, Neighborly Software is an LLC headquartered in Atlanta, GA, with around 90 employees in total. Since our inception, the cloud-based software has been revolutionizing Housing, Economic, and Community Development program administration. Serving 550+ cities, counties, and states across the nation, we deliver efficiency, compliance, and data-driven insights that help maximize community impact. With a mission to enhance the impact of public sector programs, Neighborly Software simplifies the enrollment, administration, and reporting processes for public sector grant programs.

b) An outline of the Bidder's depth and breadth of knowledge needed to carry out the scope and the extent of the work required, especially that of the project lead.

At Neighborly Software, our team is comprised of highly dedicated professionals with years of experience in their respective fields. We pride ourselves on our understanding of the needs of our customers and commitment to delivering exceptional software solutions to our clients. Our team members possess a deep understanding of the industry and are continually expanding their knowledge to stay at the forefront of the latest technologies and trends. The successful delivery of the scope of work is underpinned by three key components that set Neighborly Software apart:

1. **Our robust, best-in-class system of record:** Neighborly Software is a proven platform currently utilized by over 550 government entities nationwide. Its versatility and scalability ensure it meets the needs of programs of all sizes and complexities.
2. **Our experienced implementation team:** With thousands of hours dedicated to managing projects of this nature, our team has successfully delivered some of the largest programs in the country, including the Emergency Rental Assistance Program (ERAP) and initiatives for States and major cities. This depth of experience ensures a seamless implementation process that can meet your desired implementation schedule.
3. **Our dedicated Strategic Client Success Managers:** Assigned to you for the duration of your engagement with Neighborly Software, these managers provide personalized, ongoing support. Whether you need assistance with minor application changes, training, or troubleshooting, they are always just a call or email away, ensuring your success at every step.

Neighborly Software serves as a centralized platform for the management and delivery of publicly funded programs. It provides a secure and scalable environment where the County can efficiently manage your programs, including applications, participant data, eligibility determination, reporting, and more. See below for how it meets your statement of work:

Admin Requirement	Y	N	Comments
Create, customize, and post grant opportunities	✓		Core functionality
Create, customize, and post letters of intent and grant applications	✓		Core functionality
Ability to receive, evaluate and score letter of intents and grant applications; ability to create workflows assigning staff members to review/score individual grant letters of intent and applications	✓		Core functionality - Facilitates the review process by providing a platform for reviewers to access proposals, leave comments and feedback, and rate the proposals according to pre-defined criteria.
Create, customize and receive required grant forms including, but not limited to, agreements, requests for payment, tenant documentation, homeowner documentation, conflict of interest disclosure forms and other documentation required for grant submissions	✓		Core functionality
Create and customize web-based grant reporting templates.	✓		Core functionality - report builder allows you to create ad hoc configuration of reports that may display data captured in the application or admin sections of a program.
Download all applications and supporting documents.	✓		Core functionality - can also be viewed directly in platform
Generate detailed reports comprised of completed application data and/or applicant characteristics.	✓		Core functionality
Request, receive and track uploaded documents	✓		Core functionality - Each case features a "Documents" area where all uploaded files associated with the applicant are stored.
Create, modify and maintain a "forms library" with frequently used forms that applicants/grantees can access.	✓		Core functionality
Auto-generate email communication to applicants/grantees when items are due and/or updates are needed.	✓		Core functionality
Develop and utilize e-mail templates and generate group e-mails from the software	✓		Core functionality - Templates (such as notice of award, denial, waitlist) and other documents can be uploaded to the platform for recurrent use

Structure a hierarchical approval of submissions for applications and/or documentation	✓		Core functionality
Applicant/Grantee:	Y	N	Comments
Share application responsibilities across agency staff (i.e., multiple staff can work on active applications).	✓		Core functionality - an individual case can have an unlimited amount of users added/assigned to the case. Multiple participants can work on applications concurrently
Ability to "check for completion" with submission blocked unless all required fields are complete	✓		Core functionality - application checklist prevents applicants from submitting an application until all required pages/fields are complete
Both:	Y	N	Comments
Communication portal which allows for tracked communication between DuPage County and applicant/grantee.	✓		Core functionality - Only e-mails sent directly through the platform will be recorded in the audit log. The audit log can also log communication manually from construction site visit results, phone call summaries, etc.
Receive training and technical support including time-sensitive technical support around application deadlines.	✓		Core functionality
Have multiple, individual accounts created for each agency with access able to be limited based on staff function.		✓	Core functionality - user permissions can be limited by account
Software should provide data security with records retained in the system and disaster recovery backup in place.	✓		Core functionality
Ability to see historical grant application activity (i.e., software ensures previously submitted applications are easily retrievable).	✓		Core functionality
Software should maintain an audit log to record activity in the system.	✓		Core functionality
System Requirements:	Y	N	Comments
Respondent shall provide a proven, flexible, and customizable system. This should be done through a comprehensive interface and interactive program with functions to meet the needs defined by Community Development	✓		Core functionality
Provides a reliable, secure, and fully auditable system.	✓		Core functionality
Has the capability to incorporate and bring online, in timeframes agreed to by Community Development, and	✓		Core functionality

provide new technology and routine system upgrade.			
Has the capability to interface with related software packages to including, but not limited to DuPage County website using industry best practices.	✓		Neighborly Software does not directly integrate with the County's website. However, through our Snowflake Data Warehouse (not included in this pricing), the County's Neighborly Software data could be leveraged and presented through a variety of third party reporting tools (Power BI, Tableau, etc.) to present analytic/visual dashboards on the County's website to share the great work that is being accomplished.
Maintains detailed audit history.	✓		Core functionality
Provides detailed report creation capabilities to include annual activity reports and date specific activity reports.	✓		Core functionality
Provides the ability to convert all data in the existing system simultaneously		✓	Not simultaneous, data conversion takes place in stages
Provides accessibility to users 24 hours per day, seven (7) days per week.	✓		Core functionality

c) Main attributes that differentiate the Bidder from other competitors.

Neighborly Software is a pure-play technology company–100% focused on building, delivering, and supporting modern software for government programs. Unlike consulting firms that offer software as a secondary service, our platform is not a repurposed internal tool or an afterthought. It is a purpose-built, production-grade solution designed to support the complex needs of public-sector grant, loan, and incentive programs.

One of our core differentiators is administrator empowerment. Neighborly Software was built to put control in the hands of non-technical users. Program staff can update field labels, edit dropdown menus, adjust eligibility rules, or revise workflows directly through an intuitive admin console–without involving developers, writing code, or submitting support tickets. This ensures the County can adapt the system as needs evolve, without delays or additional costs.

Neighborly Software is also one of the only configurable SaaS platforms to combine a full grants management module, a comprehensive loans module, and a dedicated contractors module within a single integrated solution. This unique breadth of functionality eliminates the need for multiple systems, improves data integrity, and simplifies administration across all program types.

We also offer unique functionality to enhance program integrity and transparency. Our Fraud Prevention Dashboard surfaces unusual application patterns and risk indicators in real time, helping administrators identify potential misuse and act quickly. Combined

with built-in audit logs, task tracking, and automated rule enforcement, our platform strengthens accountability and compliance.

*We are currently in the final stages of building out **a bi-directional financial integration** with a secure payments platform, and our team is also in the process of developing an integration with IDIS and GL Ledger.*

d) Relevant previous experience with public sector entities.

Neighborly Software recognized the need for a modern and configurable Software as a Service (SaaS) cloud-based solution designed to support both the common and unique functional needs of such organizations, and our team of experts worked closely with professionals across the country to gain a deep understanding of federal, state, and local programs. The result is an industry-focused solution that can be configured and deployed quickly and with reasonable implementation and ongoing support costs. Simply put, our software solution is built by and for local, state, and federal needs!

*Driven by a purpose to support low-income families and vulnerable populations, we foster a collaborative, inclusive work environment that values diversity, innovation, and progress. As a company, we embrace challenges head-on and are committed to continuously improving our platform to meet the evolving needs of our clients, who we proudly refer to as our "Neighbors." The platform delivers efficiency and compliance, all while being designed with the goal of maximizing community impact. **More than 30% of HUD jurisdictions in the U.S. rely on Neighborly Software** to manage at least one if not many of their grant programs.*

Our team is deeply dedicated to our mission of "Helping Communities Help People," and we operate with integrity, transparency, and a results-driven mindset. This commitment to our work, our customers, and the communities we serve is reflected in the strong relationships we build and the positive outcomes we help achieve.

e) Business Licenses, Tax ID and any other significant certification document supporting the Bidder's expertise.

Tax ID: 81-0880368

f) List of three (3) references including engagement profile, client name, contact name, title, email, and telephone contact information. References from public sector entities for contracts that are similar in size and scope are preferred.

Neighborly Software has included 3 references of similar size and scope on the "References" form attached to this response.

4) KEY QUALIFICATIONS: Provide a statement that portrays the Bidder's engagement team qualifications in relation to the Scope of Services. The response should include the following:

a) Background and credentials profile for the team and sub-consultants (if used) that would be assigned to the County account, including name, position/title, location, years of industry experience, years with Bidder, and number of clients currently assigned.

b) Areas of expertise of each Officer.

c) Communications skills – Interaction with staff and participants.

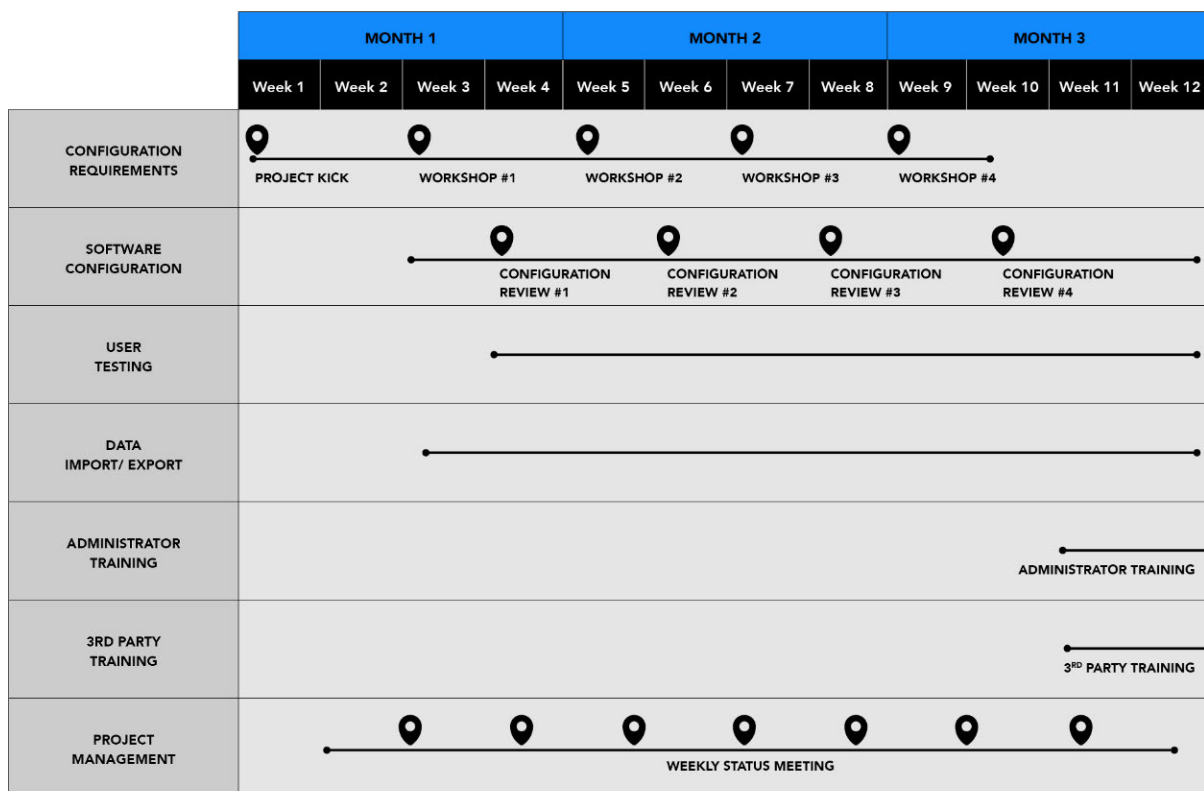
The project team has over 80 years of experience implementing and/or administering housing, economic and community development programs. Our industry knowledge expedites the implementation and support processes and provides you with best practices to drive operational efficiencies, improve program compliance and maximize community investment outcomes. For you, this means no time wasted explaining the challenges and nuances of housing, economic and community development programs.

*Upon start of contract, the County would be introduced to their **Client Relations Manager** and team, all of whom have years of experience implementing housing and community development programs. This is a relationship you will have for the entire time you are one of our "Neighbors." At implementation kickoff, your team will transition to communicating with their **Implementation Lead** for day-to-day activities until go-live. You will then be assigned a **Client Success Manager** as a regular point of contact, who will handle all the initial client support, onboarding, and training, as well as a **Client Support Specialist** to assist with technical issues. Since everyone is on the same team, there is an unbroken chain of internal communication regarding your experience with Neighborly Software.*

Resumes for the project team are included with this response.

5) PROJECT UNDERSTANDING: Describe the Bidder's interest, understanding, and approach to providing services for this engagement, including a schedule for accomplishing the project. The response should also address the following:

Neighborly Software has a proven implementation methodology that has been refined over the course of our many housing, economic and community development implementations. A successful roll-out strategy is more than just dates on a calendar. Rather, it is about making sure that all stakeholders are active participants in the change process. Neighborly Software has a proven implementation methodology that has been refined over the course of over 550 successful implementations and we anticipate completing the system configuration ~10 weeks for each phase:



Since the County already has a functioning portal with Neighborly Software, the implementation period would be drastically reduced, saving money and allowing you to serve your community sooner! The only need the County would have for implementation is if you wanted to add more programs alongside the ones you are already administering through the portal.

a) Describe the ongoing management for services.

*The Neighborly Software solution is built and delivered using the Software as a Service (SaaS) model. The solution is fully hosted using Microsoft's FedRAMP certified Azure cloud computing platform and **requires no staffing requirement from the County IT department***

for installation, maintenance, backup, upgrade, or customization. The system is accessed via a web interface and dynamically renders on any internet-enabled device, including mobile phones and tablets. Through our partnership with Microsoft, our solution automatically scales to meet the demand for server and data storage capacity. This ensures maximum uptime and efficient processing of each data request and transaction.

As a part of the services, Neighborly Software is responsible for maintaining a backup of your data and for an orderly and timely recovery of such data if the Services may be interrupted. Neighborly Software maintains a contemporaneous backup of data that can be recovered within four (4) hours at any point in time within the last 35 days. A weekly back-up of data is also available for 2 years. Automated back-ups are performed by SQL Azure and require no manual activities.

b) Provide a list of performance metric guarantees.

CSTAT scores are reviewed each week to be sure they're above 75%. Administrative tickets should have a response time of 2 hours or less, and Participant tickets should have a response within 48 hours (we usually respond same day). These services are only applicable during normal business hours, which is M-F 8am-8pm.

c) Provide sample incident reports.

Neighborly Software maintains a comprehensive Incident Response Policy that addresses breach detection, containment, investigation, notification, and remediation. Our policy is designed to comply with all applicable Federal, State, and local laws regarding the handling of data breaches and data exfiltration events.

In the event of a breach or suspected breach, Neighborly Software's Incident Response Team follows a documented, time-sensitive protocol that includes immediate assessment, mitigation, impact analysis, customer notification in accordance with legal requirements, and detailed post-incident reporting. This policy is reviewed annually and updated as necessary to remain compliant with evolving legal standards and industry best practices.

d) Provide proposed procedures for internal problem escalation and process for notifying the County in the event of a problem.

Neighborly Software provides an "all-inclusive" support model, meaning that all of our support options are available to the County, included throughout the life of our contract. There are rare occasions where some of our Neighbors require "non-standard" support, i.e. on-premise training, which we are happy to accommodate. Technical support is available via a toll-free phone number and electronic mail on weekdays during the hours of 8:00 am through 8:00 pm Eastern Standard Time, with the exclusion of federal holidays. Clients may initiate a helpdesk ticket during support hours by emailing support@neighborlysoftware.com.

In addition to our support option, the "Help" icon is available on the bottom right of each page in Neighborly Software. This configurable popup features frequently asked support questions that users can use to request assistance.

All stakeholders (e.g. Administrators, Subrecipients, Developers, Reviewers) have access to virtual User Guides that highlight software functionality specific to their role. There are two sets of User Guides, one will be static while the other will be continuously updated as follows:

Static: During implementation, the County will receive a static document that outlines your specific configurations and process flows for each of your programs. This document is shared with you in an editable format and can be distributed to potential applicants, users, etc.

Online and Updated: User guides are accessed directly through the applications. As features or functionality change, the user guides are updated online in the system.

Neighborly Software uses ZenDesk for all support ticket tracking and reporting. Below are response and resolution times for support tickets:

- **Standard Ticket:** Issue does not significantly impact operations, or there is a reasonable workaround available. **Neighborly Software will use commercially reasonable efforts to resolve ticket within eight (8) hours before elevating issue.**
- **Priority Ticket:** Software is usable, but some non-critical features are unavailable. **Neighborly Software will use commercially reasonable efforts to resolve ticket within two (2) hours before elevating issue.**
- **Emergency Ticket:** Issue has rendered software unavailable or unusable, resulting in critical impact to business operations and requires immediate resolution. **Neighborly Software will use commercially reasonable efforts to resolve ticket within one (1) hour before elevating issue.**

Jason Rusnak

Co-founder and President

SUMMARY OF ACCOMPLISHMENTS

Leader with 23 years of experience in business transformation processes, strategic direction, legislation, and government directive implementation. As co-founder and President of Neighborly Software, Mr. Rusnak is a long-time advocate of the company's vision of Helping Communities, Help People, and has worked tirelessly to build a culture of service within the organization.

WORK HISTORY

Neighborly Software

Co-founder and President, 2015 – Current

- Co-founder of a SaaS company that provides a cloud-based software solution to improve the administrative efficiency and regulatory compliance of Housing, Economic and Community Development organizations.
- Strategic direction, goal establishment, budget planning, policy, and procedures

Automatic Data Processing (ADP)

Division Vice President, 2010-2015

- Senior Leadership Team of National Account Services (NAS), a \$1.9B division of ADP.
- Led a high-performing team responsible for driving profitable revenue growth while transforming the business from a payroll provider to a broader Human Capital Management provider.

Accenture

Senior Manager, Government Strategy – 1999 – 2010

- Worked closely with Federal, State and Local governments to improve government operations by re-engineering processes, incorporating new technology and/or creating long-term strategic plans.



AREAS OF EXPERTISE

Software as a Service

Public Sector and
Government Agencies

Strategic Planning

Business Operations

Implementation Process and
Procedures

EDUCATION

Master's Degree
University of North
Carolina

Bachelor's Degree
Denison University

SUMMARY OF ACCOMPLISHMENTS

A strategic thinker and data-enthusiast with 13+ years of experience in senior leadership roles at [REDACTED]

WORK HISTORY

Neighborhood Software

[REDACTED] 2021 – Current

- Responsible for Technology Roadmap, Architecture, Development, QA, Sustaining Engineering, Security and DevOps

[REDACTED]
Director, 2015-2021

- Responsible for overall Data/Analytics Vision, Strategy, Execution and Rollout across Americold Business Units and Customers.
- Responsible for Business-Relationships and Technology for Analytics and Cloud-based Applications.

[REDACTED]
Senior Manager/Director, 2014– 2015

- Worked closely with Federal, State and Local governments to improve government operations by re-engineering processes, incorporating new technology and/or creating long-term strategic plans.

[REDACTED]
Director, 2008-2016

- Led/managed geographically diverse and cross-functional software teams to deliver risk management enterprise software.

AREAS OF EXPERTISE

Software Development

Public Sector and

Government Agencies

Information Technology

Cloud-Based Applications

Leadership

Business Intelligence

Implementation Process and

Procedures

EDUCATION

Master's Degree
Georgia State University

Bachelor's Degree
Gujarat University

Manager, Client Relations

SUMMARY OF ACCOMPLISHMENTS

A Manager of Client Relations for our HCD clients, [REDACTED] has worked at Neighborly Software directly with our clients for over 4 years. In addition to managing his team's portfolios, he oversees their professional development to ensure all associates have subject matter expertise in the configuration and use of our software to ensure successful, long term client relationships

WORK HISTORY

Neighborly Software

Manager, Client Relations 2024 – Current

- Mentors and develops a team consisting of Implementation Managers, Client Success Managers (CSM), and Client Success Specialist (CSS).
- Oversees client portfolio for team, ensuring customer satisfaction and retention after sales handoff
- Leads the onboarding process for new clients, overseeing configuration and end user training with accountability for system adoption and client success.
- Develops and implements strategies to enhance client experience and drive client success including creating a fully developed onboard training for each position
- Collaborates cross-functionally with Sales, Product, and Development Teams to address client needs and ensure alignment with business goals

Senior Client Success Manager, 2022 – 2024

- Handled 30+ different client accounts of all sizes and program types
- Performed configuration requests and provided user training to improve platform usage
- Nurtured client relationships to promote retention and expansion
- Proactively and efficiently resolved requests and coordinated internal resources/departments to address unique client needs.

Client Success Manager, 2021-2022

AREAS OF EXPERTISE

Software as a Service

Public Sector and
Government Agencies

Client Success & Support

Configuration

Housing & Community

Development

Implementation Best Practices

EDUCATION

Bachelor's Degree
Georgia Southern University

[REDACTED]

Client Success Manager

SUMMARY OF ACCOMPLISHMENTS

[REDACTED] is a dynamic and results-oriented professional with extensive experience and a proven track record in product ownership within the IT sector. As a Client Success Manager, she brings a proactive problem-solving approach and commitment to satisfaction to all of her clients.

WORK HISTORY

[REDACTED]
Client Success Manager, 2024 - current

- Participates in the onboarding process for new clients before transitioning to primary point of contact, handles configuration and end user training
- Manages a variety of client accounts of all sizes and program types
- Performs configuration requests and provided user training to improve platform usage
- Nurtures client relationships to promote retention and expansion
- Proactively and efficiently resolves requests and coordinates internal resources/departments to address unique client needs.

[REDACTED]
IT Product Manager/Owner, 2020-2023

- Oversaw development of several key products.
- Worked closely with stakeholders to articulate and refine the product vision, and construct a comprehensive roadmap.

Associate IT Product Owner, 2019-2020

- Created and tracked progress on required product tasks, clearly communicated anything outstanding to ensure it aligned with business goals.

AREAS OF EXPERTISE

Software as a Service

Client Success & Support

Configuration

Product Management

Housing & Community

Development

End User Training

EDUCATION

Bachelor's Degree
Islamic Azad University

Master's Degree
Islamic Azad University