

Request for Proposal

Grants Management System

RFP Release Date: January 9, 2025

Proposal Due Date: January 24, 2025, 5:00pmET

CDC Foundation Contact: aazor@cdcfoundation.org

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1. CDC FOUNDATION OVERVIEW

The CDC Foundation is an independent nonprofit organization created by Congress to mobilize philanthropic and private-sector resources to support the critical health protection work of the Centers for Disease Control and Prevention (CDC) and the nation's public health system. Since 1995, the CDC Foundation has raised over \$2.2 billion and launched more than 1,400 programs impacting a variety of health threats from chronic disease conditions including cardiovascular disease and cancer, to infectious diseases like rotavirus and HIV, to emergency responses, including COVID-19 and Ebola. The CDC Foundation managed hundreds of programs in the United States and in nearly 80 countries last year.

2. RFP OVERVIEW

RFP Release Date	January 9, 2025
Proposal Due Date	January 24, 2025, 5:00pmET
RFP Contact Information	Ashley Azor, Procurement Manager, aazor@cdcfoundation.org
RFP Submission Link	https://app.smartsheet.com/b/form/d21e757f976542c2b8b7bdc0d9445629
Contract Term	The term will depend on the contract's duration and project implementation timeline outlined in the agreed project plan. Respondents should propose an implementation timeline with major milestones and deliverables. The final term and timeline will be finalized during contract negotiations.
Funding and Payment Structure	The funding amount will be based on the scope of services and deliverables. Respondents must submit a detailed cost proposal with itemized pricing and associated implementation costs. The final budget will be negotiated after the selection process.
Minimum Applicant Eligibility Requirements	To apply, an organization must: <ul style="list-style-type: none">• Be headquartered in the United States.• Maintain good financial standing and sustainable operations.• Operate as an equal opportunity employer, ensuring inclusive practices and non-discrimination based on gender, race/ethnicity, color, sex, sexual orientation, nationality, age, religion, disability or military/ veteran status.• Have at least 5 years of experience developing and implementing grants management systems for nonprofit organizations, including:<ul style="list-style-type: none">○ Integration with platforms such as NetSuite and Salesforce.○ Compliance with federal requirements, including Uniform Guidance (2 CFR 200).• Provide evidence of successfully completing similar projects, with a minimum of three relevant client references.

	<ul style="list-style-type: none"> • Demonstrate sufficient staffing and resources to meet project deadlines and ensure post-implementation system maintenance and support.
<p>Requirements for Vendor Approval and Pre-Award Risk Assessment</p>	<p><u>Vendor Approval Process:</u></p> <ul style="list-style-type: none"> • Awarded agencies will be required to undergo a Vendor Approval process. <p><u>Pre-Award Risk Assessment:</u></p> <ul style="list-style-type: none"> • Selected applicants will be subject to undergo a Pre-award Risk Assessment. <p><u>Required Information for each include:</u></p> <ul style="list-style-type: none"> • Organization Name • EIN/Tax ID • DUNS Number - To request a DUNS number, visit https://www.dnb.com/duns-number/get-a-duns.html • SAM Unique Entity Identifier Number (UEI) • Organization Address, Phone Number, and Website

3. SUMMARY OF NEED

The CDC Foundation is seeking a qualified Vendor to implement a Grants Management System (GMS) to enhance the efficiency and effectiveness of our grants and vendor management processes. The system must streamline grant tracking, ensure compliance with federal and organizational policies, and integrate with existing platforms including NetSuite and Salesforce.

The selected GMS will serve as a centralized platform for managing the lifecycle of grants and contracts, providing an interface for internal stakeholders and external partners, such as subrecipients and contractors. Key priorities include reducing processing times and manual tracking, increasing transparency, and improving the accuracy of reporting and monitoring activities.

4. SCOPE OF WORK

The CDC Foundation seeks to implement a GMS to support its diverse portfolio of 50+ federal prime awards and 200+ contract and subrecipient awards, totaling \$100+ million annually. Our goal is to implement a GMS that provides a user-friendly interface, robust reporting capabilities, and seamless integration with existing financial and compliance systems. The GMS must include elements for tracking both grants received and grants awarded. This RFP outlines the scope, requirements, and submission guidelines for vendors interested in providing a solution tailored to our needs.

Scope Description: The Grants Management System should include the following elements:

- **Lifecycle Tracking of Grants**
Functionality to track each stage of a grant’s lifecycle, from pre-award to post-award, including risk assessments, procurement, budget management, reporting, and closeout activities. The system should function for both the grants received by our organization and those we grant out.
- **Budget Tracking and Management**
Budget management features, including real-time tracking, cost allocation, and alerts for budget adjustments or potential overruns.
- **Integration Capabilities**
Seamless bi-directional integration with our existing platforms—Salesforce and NetSuite.
- **External Portal for Subrecipients and Contractors**
An external portal where subrecipients and contractors can securely upload applications/proposals, invoices and/or reports, communicate with our team, and check the status of submissions.
- **Invoice Review and Approval**
Capabilities for invoice submission, review, and approval workflows, ideally with automated notifications and an audit trail to track approvals and changes.
- **Organization Diversity**
Features that incorporate an applicant’s diversity categories in both pre & post award.
- **Monitoring and Risk Assessment**
Tools that allow us to monitor deadlines and deliverables, project progress and compliance, risk management (performing risk assessments to determine and apply appropriate levels of risk) and document any actions taken to mitigate risk within grant projects.
- **Reporting Functionality**
Reporting tools that allow custom reporting, data exports, and visualization options for internal and external stakeholders, including dashboards.

Implementation and Training Requirements:

- **Implementation Timeline**
Design an implementation schedule achieving full system operational status by June 30, 2025.
- **User Training**
User training sessions and resources, including manuals, training modules, and user support.
- **Testing and Quality Assurance**
Comprehensive system testing, with user acceptance testing to ensure system readiness.

Maintenance and Support:

- **Technical Support**
Ongoing technical support, including troubleshooting and updates, with preferred response time.
- **System Maintenance**
Details on routine maintenance and support for future upgrades.

5. PROPOSAL REQUIREMENTS

Section 1: Company Information

Provide the following information in the online form linked above:

- Legal Company Name and DBA
- Abbreviated Name (if applicable)
- Street Address, City, State, Zip Code
- Phone Number
- Primary Point of Contact Name, Phone Number, and Email
- Federal Tax Identification (ID) Number/Employer Identification Number (EIN)
- Data Universal Number System (DUNS) number
- SAM.gov Unique Entity Identifier (UEI)
- Year Established
- Number of Employees
- Annual Revenue
- Diverse Supplier Classification
- Previous CDCF Partner

Section 2: Proposal Narrative

Provide a response to each question below in the online submission form.

- How the solution addresses each requirement in the Scope of Work.
- Overview of the Vendor's history and expertise in grants management systems
- Implementation methodology and timeline.
- Relevant qualifications of key team members who will work on this project.
- Examples of similar work and client references.
- Any additional or optional features that may add value.

Section 3: Pricing Information

Provide as an attachment a comprehensive, itemized pricing plan outlining all costs associated with the project, including:

- System design & development.
- Initial implementation.
- Licensing or subscription fee structure (e.g. # of users, data volume, etc.).
- Data migration and integration with NetSuite and Salesforce.
- Training and technical support.
- Reporting creation/customization costs.
- Regular ongoing maintenance and updates.
- Post implementation customizations outside of regular maintenance (e.g. field updates, import of historic data, etc.).

Clearly delineate between any one-time initial implementation/set-up costs and ongoing carrying costs. Specify any assumptions made in preparing the pricing information (e.g., user volume, customization

requirements, non-profit rate, etc.). Outline the proposed payment schedule (annual, monthly, etc.). If applicable, submit pricing for both fixed and variable cost models. Include options for scaling the system based on user growth or expanded functionality.

6. EVALUATION CRITERIA

Proposals are evaluated based on the following criteria:

Selection Criteria	Scoring Percentage
Vendor Experience & Expertise: Proven expertise in grants management systems.	10%
Scope of Work Alignment of the proposed solution with our functional and technical requirements.	50%
Implementation and Training: Quality of the implementation plan and user support strategy.	20%
Cost-Effectiveness: Pricing and overall value for money.	20%
Total	100%

Should the CDC Foundation elect to conduct demos with short-listed candidates, Vendors should plan for a brief and concise presentation focused on demonstrating their understanding of the scope of work, how their system proposes to meet the goals outlined in the RFP, and how the solution could be implemented.

7. APPLICATION SUBMISSION AND TIMELINE

Applicants should follow the instructions set forth in this RFP in the preparation and submission of their proposal to the CDC Foundation. The CDC Foundation will not be responsible for any proposal that does not follow the instructions in this RFP, and may, at its discretion, reject any such non-compliant or incomplete proposal.

Submission of Proposals:

Proposal must be submitted by **5:00PM ET on January 24, 2025** using the online submission form linked above. The form will close after the deadline and no revisions or resubmissions will be accepted. A system-generated receipt confirmation will be provided upon submission. Please use Google Chrome or Firefox for the best experience, as the form does not allow users to save progress. Applicants are encouraged to submit their proposal well before the deadline to avoid technical issues.

The CDC Foundation is committed to accessibility. If this document presents challenges, please email Ashley Azor, Procurement Manager, aazor@cdcfoundation.org, with the subject line "Accessibility Assistance" for support in obtaining the information in an alternative format.

Anticipated Timeline:

The timeline below is subject to change at the sole discretion of the CDC Foundation:

January 9, 2025	RFP released
January 24, 2025, 5:00pm ET	Proposal submission deadline
February 2025	Funding notifications sent out
March 2025	Project plan/budget refinement and finalization of agreements
April - June 2025	Project implementation period

8. BASIS FOR SELECTION

The CDC Foundation may award a contract based on initial proposals without further discussion. Proposals should present the best technical and cost solutions. The Foundation may request presentations, interviews, clarifications, or best and final offers, and conduct a pre-award risk assessment, which could impact eligibility or award terms.

Proposals will be evaluated according to the criteria in Section 6, with the highest-ranking Vendor selected. The selection committee will consist of individuals with subject matter expertise. The selection will be based on the applicant’s understanding of the CDC Foundation’s grants management system needs and demonstrated experience with implementing similar solutions. The selected Vendor will be notified in writing.

The CDC Foundation reserves the right to reject any or all proposals and will negotiate terms with the selected Vendor. If an agreement cannot be reached, negotiations will proceed with the next highest-ranked Vendor.