



Request for Proposals for a Comprehensive Grants Management System

Purpose

The purpose of this Request for Proposals (RFP) is to invite entities with expertise, tools and technology in managing workflows for organization-wide program implementation and management, including management and training related to compliance, risk management, and enterprise-wide knowledge building, adoption and monitoring of processes and procedures. Inclusiv seeks partners who can offer an end-to-end solution to support the onboarding, training, reporting, and monitoring of hundreds of grantees. The system provider will be responsible for the development, customization, improvements and maintenance of a grants management system, and integration with other required grant management software. Interested candidates should be able to offer a highly customized platform that is compliant with U.S. federal awards providing grants to approximately 300-500 grantees.

Timeline

- Proposals are due January 6, 2025.
- All questions should be submitted no later than December 30, 2024.
- Inclusiv will select a proposal and notify the selected candidate no later than February 1, 2025.

Eligibility

To be eligible for consideration under this RFP, you must meet the following requirements:

- Must be available to provide all requested services including maintenance and improvement support for the possible full period of performance, February 1, 2025, until June 1, 2030.
- Must provide all required proposal materials by the deadline, January 6, 2025.
- Must not be excluded for participation in U.S. federal assistance programs and must consent to an exclusion check on SAM.gov, as required under 2 Code of Federal Regulations Appendix II of Part 200. Inclusiv will complete the exclusion check.
- Must demonstrate technical capacity with customizable and comprehensive grant management systems development and management including all aspects of grant management from application to post award set up, contracts, onboarding and training, compliance and risk monitoring, performance monitoring and reporting, and compatibility with other common software used for related activities.
- Must provide reputational and operational company details to demonstrate good standing, successful past performance, data security and compliance. More details are provided below.
- Must demonstrate experience on similar projects over the past 5 years. Experience with credit unions, credit union system partners, and/or U.S. federally funded projects is preferred.

Background

About Inclusiv

Inclusiv is a mission-driven non-profit organization. We are the leading network of credit unions with primary mission of promoting community development and financial inclusion. We are a certified Community Development Financial Institution (CDFI), the only CDFI exclusively dedicated to investing in



the community development credit union movement.

Project Overview

Inclusiv will provide grants to credit unions to offer green lending programs that serve low-income and disadvantaged communities (LIDACs).

Through Inclusiv, 300-500 credit unions will receive grants from Inclusiv over the next three to four years to help grow affordable green lending programs. Credit unions will be able to apply to Inclusiv for grants up to \$11 million to cover operating and capitalization costs for their lending programs, as long as 100% of these funds reach LIDACs. Each credit union's grant term will be about two years, but may be longer, and will be determined based on the credit unions grant proposal and lending plan.

Scope of Work (SOW)

Successful proposals should address the key deliverables of the SOW detailed below.

Overall grant management system development and management with the following features and activities:

- Grant application
 - Track, assign and manage the workflow of grant applicants.
- Grant application external panel review process
 - Assign reviewers to panels with completed applications, reviewers to communicate via the platform.
 - Inclusiv managers to schedule review panels, monitor progress of review panels.
- Grant application internal decision-making process
 - Award Amount & Milestones
 - Disbursement Schedule
 - FIDAP Integration
- Grant award notification
 - Expectations
 - Required Documentation
- Grant award review
 - Award Overview
 - Contract Review & Execution
 - Training
- Grantee Onboarding
 - Administrative & Operational Set Up
 - Compliance Requirements
 - Draw Request
 - Funds Disbursement & Tracking
 - Data Collection, Storage & Monitoring
 - Reporting
 - Training Activities (Content Development & Storage)
- Grantee Success



- Goals
- Program Readiness Review
- Operating Interface for Grantee
- Implementation Plan
- Resource Tracker
- Gaps Analysis & Internal Controls
- Strategic Planning
- Ongoing Monitoring
 - Ongoing Monitoring Procedures
 - Milestone Payments
 - Reporting (Quarterly, Semi-Annual & Annual)
 - Transaction I Level Reporting
 - Single Audit (A-133)
 - Financial Statement Audit
 - Quality Assurance Project Plan
- Grantee Closeout
 - Sharing guidance materials
 - Closeout report submission
 - Report tracking

Proposals should also describe your capacity and approach in customization, improvements, maintenance, any additional support, and integration capabilities with other common software/platforms related to grant management software (e.g., performance data management software, contractual document platforms, etc.). Inclusiv anticipates that this grant management system will only serve one program.

Please also note the additional proposal content requested in the next section.

Proposal Requirements

Please ensure your proposal includes the following information:

1. **Overview & Team:** Please provide a brief overview of your organization, mission, governance, leadership and staff members who will be working on the project, including their roles and relevant experience.
2. **Capabilities & Approach:** Describe your capacity and approach in working with Inclusiv on all areas of the scope of work above adding details covering customization, improvements, maintenance, any additional support, and possible compatibility with other common software/platforms related to grant management software (e.g., performance data management software, contractual document platforms, etc.). Inclusiv is seeking candidates that can rapidly set up the grant management system so that grantees can be engaged as soon as possible.
3. **Data Security:** Include a simple data flow map with potential threat mitigation details and a brief disaster recovery contingency plan.



4. **Good Standing:** Provide standard reputational and operational company documents and/or information to demonstrate good standing, data security, and compliance. Please annex standard files and/or draft a brief section in the proposal narrative describing:
 1. Financial performance,
 2. Data privacy controls,
 3. Insurance coverage,
 4. SSAE 18 report compliance, and
 5. 2-3 references from partners with whom you have developed similar projects; preferably projects involving credit unions or a credit union system partner and/or federally funded projects.
5. **Cost Proposal:** Include a detailed cost breakdown and any payment terms for an anticipated fixed-price contract including the profit rate. Proposals should include a quote for services over the possible full period of performance, February 1, 2025 until June 1, 2030.

Disadvantage Business Enterprise (DBE) certification is desired, if available. If you are certified as a small business, minority business, women's business enterprises, veteran-owned business, a labor surplus area firm, or certified as another class of disadvantaged business with certification from a federal or local government agency, please also include your certification as an annex. Certification is not required and will not affect proposal evaluation scoring.

Proposals should be submitted electronically and contain a maximum of 10 pages with an additional maximum of 8 pages for annexes. Additionally, the proposal should generally reflect the formatting preferences below:

- Use black Arial, Calibri, Helvetica, or Computer Modern font,
- Use a font size of 11 points or larger,
- Margins must be at least one inch in all directions, and
- Use a standard letter page size 8.5 x 11.0 inches.

Evaluation Criteria

The proposal will be evaluated considering the criteria listed below.

Criteria	Weight
Overview, team capacity, and responsiveness	15%
Technical capabilities, approach, and potential for rapid set up	20%
Data security features	20%
Good standing – operational standards, reputation & past performance	20%



Cost proposal - value for price, profit rate proposed.	25%
Total	100%

Submission Instructions

Please submit your proposal by January 6, 2025 to Abraham Cisne at acisne@inclusiv.org. If you have any questions or require further clarification, contact Abraham Cisne at acisne@inclusiv.org. All questions should be submitted no later than December 30, 2024.