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A COMPREHENSIVE GUIDE TO

Writing an Effective RFP for Grant Management Software

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Introduction

If you are a grant program administrator, procurement manager, finance director, or CIO, you have arrived here because you are considering acquiring Grant Management Software (GMS). You know this software is necessary for your state, local or tribal government, either to create a new or enhance an existing grant program.

In either case, it is likely (and understandable!) that you may not be an expert in the features and capabilities of modern, cloud-based grant management software. However, you must now compose a Request for Information (RFI) or Request for Proposal (RFP) that outlines all current and future requirements that your public entity may need. This task can be daunting, but we are here to help you. Here, find everything you need to know to compose an RFP that meets your needs for grants management software as a government entity.



Throughout this document, you will see the term **RFP** as we reference the process, but feel free to interchange the term with **RFI** or **RFQ** (Request for Quote) if that is the desired document you are creating.

To RFP or not to RFP

The RFP process is a typical step for public entities seeking to acquire grant management software, but there are cases where it may not be wise, necessary, or even feasible. While issuing an RFP often makes sense, whether due to a desire to receive competitive bids or as a non-negotiable agency protocol, there are significant drawbacks worth considering if your situation is more flexible. One of the biggest drawbacks is the amount of time that it eats up.

The RFP process is not always as simple as it may seem at the outset. You'll need to draft it carefully, solicit responses (with an adequate deadline to expect the most thorough and competitive offers reasonably), honor a Q&A period with respondents, and after all of that—your team must thoughtfully review and go through your decision-making process. Only once you select the vendor may you get to the important, often urgent work, of building out your program on the new software.

For these reasons, we recommend that before drafting your RFP, check out alternative ways to purchase the software you need. Here are a few common situations where an RFP may not be your only or best option:



Alternate procurement processes

Consider not pursuing an RFP if:

1. Your purchase qualifies for a sole-source contract
2. The cost is lower than the budget threshold
3. A preferred vendor is listed on your state contract or through a pre-approved purchase group
4. An adjacent municipality has an existing contract with a preferred vendor
5. During emergency procurement

When the software is the sole source to fulfill a key

requirement. If you can demonstrate that a particular software provider offers features that are unique and cannot be found elsewhere, you may be able to secure a sole-source contract without the need for an RFP. Sole-source contracts are issued when only a single business can fulfill the requirements of a contract. For instance:

- A tight timeline to launch
- Track record in preventing fraud
- Built-in, zero-lift comprehensive audit-preparedness

These are examples of requirements that may be non-negotiable elements of your RFP that only a single vendor may fulfill. If you would like to work with Submittable, we can provide guidance on a sole-source justification.

If you can leverage state contracts or cooperative purchasing

agreements. Additionally, if existing state contracts offer your preferred software of choice, or if other similar agencies/entities in the state have already gone through the RFP

process, you may be able to piggyback on those contracts without going through the process yourself. For example, Submittable is on the Software Licensing Program (SLP) contract with the State of California. Another option is to explore technology buying groups such as Carahsoft or GSA that have already negotiated government contracts with multiple software providers. Submittable is available through [Carahsoft](#), [NASPO](#), [GSA Advantage](#) and [SLP](#).

If the software is below the spending threshold. If the value of the software purchase is below the spending threshold set by the agency or department, an RFP may not be necessary. While researching GMS platforms, it is worth getting some ballpark price quotes to determine if you need to go to RFP and if your budget will allow for the solution.

When there are existing contracts. This may sound obvious, but do ensure you don't already have a contract within your municipality. For example, Submittable can run multiple programs on one platform—and you may already have access through a different division of your tribe, city, county or state department without knowing it. Even if your program requires a unique program portal, you can still qualify for significant savings for adding to an existing contract (in addition to the benefit of skipping a lengthy RFP process).

During emergency circumstances. In times of crisis, such as a natural disaster, health pandemic or a state of emergency declaration, there are often [acquisition flexibilities](#) that allow you to source a solution to get funds and resources when they are needed most in time to avert further harm to impact communities.

It is essential to consider all of these factors and evaluate whether an RFP process is the best approach for acquiring the necessary grant management software.



Considerations for drafting your RFP

If you determine that an RFP is the most appropriate choice, we will guide you in creating an effective RFP that enables you to choose the best vendor to meet your objectives.

The best way to measure the value you will get from a GMS is to ensure that it aligns with your business case. For this reason it is worth drafting out your business case before you before conducting your initial research and cost analysis.



Business case

Your business case will communicate the benefits your are looking to achieve by adopting a new software.



When detailing your business case, consider:

- **Overall strategic goals and purpose.** Articulate the overarching objectives of your grant program, including a summary of your vision and how the GMS fits into your overall strategy.
- **Program priorities.** Include any organizational priorities that you would like to ensure runs throughout your grant process. For instance, your program may prioritize diversity, equity, and inclusion in its grant-making process and require a platform that supports these goals.
- **Project scope.** List what this project will achieve and what is not part of it. Include an overview of deliverables and services.
- **Milestones and/or timeline.** Provide a detailed timeline for the project, including key milestones and deadlines for implementing the software and getting your first grant program up and running.
- **Background information.** Detail background information on your current grant management processes, including what tools or systems you're currently using to manage grants. This should also include any pain points or challenges you've faced with your current system, and how the new software will help to address these issues.



If you haven't already, check out our guide on [Government Grantmakers Making the Case for Digital Transformation](#). This will help not just build your business case on why you need grant management software but will detail specific benefits that a purpose-built GMS can provide government teams.



To ensure that you can evaluate proposals effectively, conducting a cost analysis before drafting your RFP is critical. This involves understanding the features and functionality that you will require, so you can avoid requesting proposals with unfamiliar or incomplete pricing.

Your program parameters

Certain logistical elements of your program setup and staffing availability may influence your priorities as you consider various varieties of software. For instance:

- Do you prefer a primarily out-of-the-box, self-service solution?
- What level of customization and/or professional services do you prefer or need?
- Are you running a specific, limited-time program, or an ongoing program that you expect to continue, or even grow and scale?
- Are you looking for a single solution that will support multiple or even many programs?
- What is your ideal launch timeline?



End-to-end grant management solution

We recommend you seek a solution that will cover your entire grants management lifecycle, from planning through award and post-award (and in many cases, an easily repeatable process for the following cycle).

Program design

Within creating your grant program design your organization may need professional services such as:

- Change management
- Project management
- Uniform grant guidance
- Risk assessment
- Project impact assessment



Change management planning

As you consider implementing new software, prioritize change management to ensure successful integration and adoption. Inquire about how potential software providers can support this process. If the technology proves too complicated, individuals may resort to what they know and abandon the software adoption.

[The Standish Group's "Haze" report](#) indicates that a **mere 13% of significant government IT projects succeed**. To avoid costly custom software projects and maximize government funds, consult the [state software budgeting handbook's de-risking guide](#). The most favorable approach recommended by the State Software Budgeting Handbook involves investing in a cloud-based, purpose-built solution that consistently updates and enhances its functionality.

Change management should be part of every step of your software implementation—from planning to program closeout.

Here is a high-level overview of what a successful implementation plan partnered with change management looks like for Submittable customers.

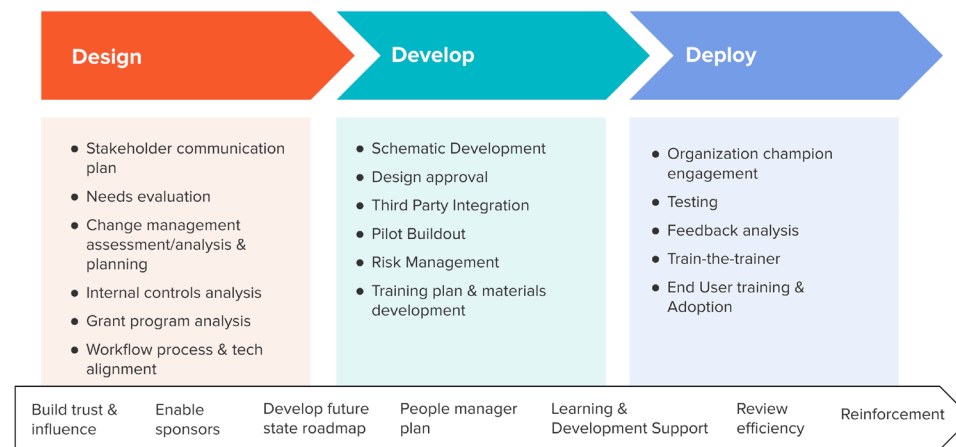


Change management planning

Change management prepares and supports individuals and teams in making organizational change.

Change Management Approach

Project plan created throughout the Program Assessment Framework





Project management

Grant management software adoption is complex, so you need to have a plan to manage all the moving parts. While change management focuses on the processes and people affected by software adoption, project management focuses on the process and activities needed to complete the project at hand.

Having an internal agency-approved project manager is a good start, but it may not be enough to ensure a successful implementation. Your software provider should provide a project manager who will work with your team to ensure a smooth and successful implementation. And, if your team does not have a dedicated project manager, you should look for a vendor that can provide one as part of their proposal.

The vendor's project manager will be part of your team and will own the project management from start to finish. This ensures that your team can maintain ownership and decision-making power while benefiting from the expertise and guidance of a skilled project manager.



Project management

Project management is the process of leading the work of a team to achieve project goals.

Uniform grant guidance

Understanding Federal compliance requirements is crucial to ensure that grant funds are used appropriately and not subject to potential clawbacks. Fulfilling these requirements is a daunting task. This is why having a partner who fully understands the [2 CFR 200 Requirements](#) is essential.

A compliant grant program starts with the following:

- **A summary of the 2 CFR 200 Requirements.** This will provide an overview of the compliance requirements that must be followed by grant managers throughout the grant program.
- **ARPA-specific internal controls, procurement, and monitoring overview.** This will provide an overview of the specific requirements of the American Rescue Plan Act (ARPA).
- **Compliance checklist.** For all team members to be followed throughout the duration of the program to make sure nothing is missed.



Uniform grant guidance

Uniform grant guidance is a government-wide framework for grants management and a requirement for federal awards.



We are proud to be partnered with top-tier consulting partners including [BDO, the premier consulting and advisory firm](#) that provides expert guidance to our team and customers. With their expertise, we can confidently navigate the compliance requirements and ensure that grant funds are used appropriately.

Risk assessment

A risk assessment helps you evaluate recipients for the likelihood of fraud, waste, and abuse. You should conduct this assessment before awarding the grant and again after the recipient receives the award

The risk assessment process should evaluate the following criteria:

- **Financial stability.** This includes assessing the recipient's financial health and ability to manage grant funds effectively.
- **Quality of management systems.** This evaluates the recipient's management infrastructure, including internal controls, policies, and procedures.
- **History of performance.** This assesses the recipient's track record in delivering outcomes and meeting grant objectives.
- **Reports and findings from audits.** This includes evaluating past audit reports and any identified areas of weakness or non-compliance.
- **Outcomes and deliverables.** This evaluates the likelihood of the recipient's ability to meet grant requirements and deliver on program outcomes.

Develop a risk **assessment matrix** to measure the hazard level for each criterion. This will help determine the recipient's overall risk level and guide decision-making regarding the appropriate level of monitoring and oversight required.

Also, create an **improvement plan** to assist the recipient in developing their grants management infrastructure. This plan should include specific steps and timelines for improving any identified areas of weakness or non-compliance.



Risk assessment

Risk assessment is a process of evaluating potential risks that may be involved in a project.

Project impact assessment

To ensure proper stewardship of grant dollars and prevent clawbacks, conduct a project impact assessment to measure progress and success. This assessment helps determine if the grant objectives are being met and if the project is having the desired impact.

Take the following actions when determining performance metrics:

- **Understand federal objectives.** This includes an assessment of the grant's overall objectives and how they align with federal objectives.
- **Define the framework and logic model definition.** This defines the framework and logic model that will be used to guide the project's implementation.
- **Draft measurement outcomes.** This identifies the specific outcomes that will be measured to determine the project's impact.
- **Create indicator selections.** This includes selecting the appropriate indicators to measure the desired outcomes.
- **Define outcomes and deliverables.** This includes defining the outcomes and deliverables expected from the project.

A comprehensive impact assessment includes **project justification profiles** of key performance indicators and methodology/foundation for developing the indicators. Additionally, **documented definitions of evaluation responsibilities** should be included, which outline what needs to be done, how it will be done, by whom, and when.



Project impact assessment

A project impact assessment is a decision-making tool used to assess the potential positive and negative effects of a project.

Applicant experience

Your applicants, whether they are individuals, other public entities, businesses or nonprofits, should be at the forefront of the solution you select. It is crucial to be aware of the key features that make for an inclusive, accessible, and overall positive applicant experience. Features that you may want to consider detailing in your RFP or look for in a vendor's response may include:

Upfront transparency

- An **applicant portal** that aims to establish transparent communication with prospective grant recipients by presenting program details, FAQs, and a full preview of the application setting clear expectations.
- To streamline the application process, ensure transparency, and save everyone time, incorporate an **eligibility quiz** before the launch of the application. If an applicant's responses indicate ineligibility, they should be provided with an explanation that can be catered to the individual program.

Applicant-centric features

- **Auto-save** is a simple yet crucial feature that will save applicants a mountain of headaches if they do not submit the application in a single sitting, or lose access to the internet.

- The ability to **request to edit** their application post-submission gives your applicants the ability to correct any mistakes or add new information, without having to withdraw and resubmit.
- Real-time **applicant collaboration** opens the door to participation from key outside stakeholders, such as finance teams or subject matter experts, who can easily contribute their portion of the form.
- Having a **mobile-friendly** portal and application is vital, especially for those who lack reliable access to high-speed internet, such as some rural or tribal populations.
- Your application should be inclusive for applicants. An important way to support inclusivity is through allowing **file uploads** that allow applicants to tell their stories on their own terms. This could be in video, audio, presentation or more.

The [Future of Government Aid is Human-Centered](#) is a great resource to reference on the importance of building your program with flexibility and the intention on creating a positive applicant experience.

Inclusive and supportive

- **Accessibility** is not only important, it's the law. Therefore, your application needs to be accessible to people with a varying range of disabilities. Asking for a vendor's VPAT Accessibility Conformance Report will go a long way in making sure that you are not leaving out any deserving candidates or risking violating the law. Ensure that the platform is audited for accessibility annually by a reputable third party, such as Deque. Learn how Submittable approaches accessibility in this [article found here](#).
- Similarly, ensure that your vendor has **localization** capabilities for the languages most commonly used in the communities you serve (and which languages their technical support team can effectively help).
- Applicants may run into technical difficulties and sometimes it will take a human-to-human connection to solve the issue and allow them to continue. Understanding who is responsible for **technical support** and **pragmatic support** is something you may want to consider including in your RFP.





Application management

Naturally, much of your RFP will center on core functionalities that enhance the daily productivity of your program.

Particularly if this software is intended to substitute an obsolete legacy system or a laborious manual process you will be laser-focused on finding a new vendor that can provide the efficiencies that you crave and that will result in the time-savings you need to perform and meet your goals.

Must-have capabilities for your grant management system's internal users include:

File uploads

- Look for a vendor that offers a **wide variety of file types**, from audio and video to presentations, worksheets, and more. For instance, Submittable accepts over 70 file types.

- Ensure you may select which types of files you wish to accept.
- Reviewers must be able to review the file uploads you've collected without downloading.

Tools to protect privacy and prevent bias

- **Permission levels** should be available to control which reviewers will have access to sensitive applicant information or have the ability to take actions like accepting an application or triggering a payment.
- Seek the capacity to **conceal specific responses** from some reviewers with the aim of avoiding any unjust biases that may arise.
- **Confidential review** is another crucial tool that prevents reviewers from influencing each other, and helps you identify any outliers among your review team.

Self-service and agility

- Even if you will require some customization, in most cases, it is of great benefit to have a primarily self-service **tool**. This gives you direct control over your program and allows you to move much more quickly compared to having to wait to schedule time with support staff or a project manager.
- Look also for an **agile platform** that you can edit in real time. This allows you to be responsive to what you learn after your program launches. Some vendors simply cannot handle changes following launch, or will make you go through a gatekeeper to do so. This will slow you down and could make you seem out of touch with your community if you don't incorporate their feedback quickly.

In-app communications

- To streamline grant management procedures, make sure all communication takes place within the platform. This will relieve time-consuming correspondence from your staff. As a first step, ensure the solution offers **in-app messaging**.
- We recommend you seek a platform that displays recipient messages right alongside their application as the best experience for your reviewer so that the communications occur in context.
- Seek **auto-response templates** that your team can

leverage to save time and send bulk communications that are personalized for each applicant with placeholder tags such as their name and award amount.

Integrations

- Being able to integrate with the systems that your organization uses daily is key. Availability of an **application programming interface (API)** that enables real-time exchange of data with other software or databases. Outdated APIs found in older systems may only grant access to a limited amount of data within the platform, while critical information may only be updated through slow and inefficient overnight file transfers.
- Include in your RFP that you require software with robust **two-way integrations** that facilitate the import and export of data in various ways. This will enable data-driven decisions according to your specific needs.



Ease of use

An **easy-to-use** intuitive interface that eliminates time wasted learning difficult new software.

Automations

Agencies typically initiate the search for grant management software due to cumbersome manual processes that impede their workflow and cause frustration among their team and applicants. To further optimize and streamline grant management procedures, take advantage of automation in workflow, reviews, and scheduling. Specific automations to consider asking after include:

- **Automated reviews.** Particularly if you are running a high-volume program, automating what you can in your review cycle could save you thousands of hours. This can include many different elements, such as:
 - Validating eligibility and dismissing ineligible applicants
 - Prioritizing top applications for your team
 - Performing calculations and applying scores according to your custom-defined rubric
 - Reviewer assignments
 - Moving applications between stages
- **Automated scheduling.** At the time you initially set up your program, you can automate the scheduling of all downstream requirements, such as reimbursements, legal review, and compliance steps, to ensure nothing gets overlooked.
- **Automated messaging.** Keep your applicants and team members informed by using automated, customizable response templates for messages that you send regularly.

By leveraging automation capabilities, agencies can drastically improve their efficiencies and ultimately provide a much better experience for their team.



Review process

If your program involves an element of human review, be that from your internal team, advisory board, or from external reviewers from your community, look for functionality that will simplify complex needs and streamline your overall workflow.

We discussed the need for **automated reviews** above. The below review processes can be used in tandem with automated review.

- **Qualitative review.** Unlike quantitative data that a computer can easily analyze, qualitative data requires human judgment and interpretation. Grant applications often contain qualitative data such as personal stories, mission statements, and goals, which a human must review to ensure they meet the grant criteria.
- **Quantitative review.** Seek review features that can simplify the experience for your reviewers. For instance, using basic up-and-down voting or creating a custom review form that gathers the qualitative feedback you require.

Features like these can turn a qualitative assessment into a quantitative score to make decisions based on empirical values. This will help you to make more objective decisions based on the data collected during the review process.

- **Multi-stage workflow.** The ability to set up a multi-stage process to match your organization's needs will be useful to streamline a complex process.
- **Auto-assign reviewers.** Each stage should be auto-assigned to the right team members and incorporate the style of review required at that point in your process

For example, Submittable offers the ability to pre-assign applications to individuals or groups of reviewers at each stage of your process. They'll receive alerts for each new assignment, simplifying the review process for large review teams. By incorporating a multi-stage and auto-assign feature in your grant management software, you can save time, reduce manual effort, and manage the review process more efficiently.

Fraud prevention

Unfortunately, there are many fraudulent actors out there, as evidenced by the significant fraud that occurred during the 2020 emergency programs. To combat this issue, fraud prevention, and identity theft protection are crucial components to grant programs. These topics have gained even more importance under [President Biden's sweeping Pandemic Anti-Fraud Proposal](#), which highlights the need for strong measures to prevent fraud and protect against identity theft.

One feature to look for is **automated data validation**. By cross-referencing applicant-provided data across vast third-party databases, such as Dun & Bradstreet and SAM.gov technology can save time for staff and prevent fraud, while also reducing the risk of human error.

It's crucial to ensure that funds reach their intended recipients without creating additional burdens for applicants. Therefore, look for software with **built-in fraud prevention tools at application intake** that doesn't add friction to the application process. This could include personalized knowledge-based authentication quizzes that require

applicants to answer a few short questions about their personal and private history, or identity verification tools that match selfies taken in real time to government-issued IDs. View [Submittable's fraud prevention tools](#) as an example of what to look for.

MARCH 02, 2023

FACT SHEET: President Biden's Sweeping Pandemic Anti-Fraud Proposal: Going After Systemic Fraud, Taking on Identity Theft, Helping Victims

 [BRIEFING ROOM](#) [STATEMENTS AND RELEASES](#)

Past underinvestment in basic government technology and the crush of demand during the pandemic, combined with ill-considered decisions to take down basic fraud controls at the onset of the pandemic led to a historic degree of outright fraud and identity theft of emergency benefits. This systemic fraud particularly impacted the pandemic small business programs and the new and expanded unemployment benefits that were originated in the first half of 2020—often with too little regard for basic program integrity.

Funds tracking and distribution

Effective grant management systems should include robust funds tracking and award management features, as well as be able to efficiently and accurately disburse funds.

- A grant management solution should provide **funds tracking** so that your team has one source of truth when it comes to the budget. The tool should break down how much of your budget you've awarded, delivered and reimbursed, with easy-to-interpret visualizations.
- Software must also be capable of sending **electronic grant payments** directly from the system to expedite funding and eliminate the work associated with issuing paper

checks. Electronic payments can shave days or weeks off of the time it takes to get funding to an awardee. [Learn more about funds distribution here.](#)

- While ACH is the best mechanism for paying recipients, in the event you are working with unbanked populations, it's also important that the vendor may disburse funds via **check and/or prepaid debit card**.
- Seek a **reimbursement process** that is easy to implement, manage and approve for the program manager. The ability is essential for the sub-recipient to send in reimbursements as needed for quick repayment to not slow down the good work they are performing.



Effective grant management systems include robust funds tracking and award management features.

Compliance, audit-preparedness, and close-out

Having all your data in one place will make it easier for your closeout activities including expenditure tracking, document validation, document compilation, and audit-preparedness.

- Begin with the assurance that the platform will **document** each and every activity that takes place. This is the most important step you can take from a compliance standpoint.
- Once you've ensured everything is documented, how accessible is that documentation for your audit-preparedness. Look for a tool that can **export all of your data** for your auditor in a single step, ensuring Single Audit compliance.
- If you'll be looking to report on historical programs holistically, be sure to seek a tool that provides **data migration**.
- Beyond compliance and audit-preparedness, you and your team will also be held accountable to your unique goals and objectives. To assess your progress and impact, you'll need a tool with robust **on-demand reports** and **data visualizations**.



Repeatability

Consider looking for the ability to repeat or duplicate your program to create standardization and time savings for future programs or departments. This functionality allows you to reuse your existing program as a template, making small tweaks and improvements. By doing so, you can standardize your grant management processes, reduce manual effort, and save time and resources. With the ability to duplicate your program, you can easily create templates that reflect your best practices, lessons learned, and proven strategies.

Security, privacy and stability

Grantmakers often collect sensitive data from individuals, organizations and businesses, including personal and financial information. Therefore, you must ensure the security and privacy of this data. If you are a federal agency or pass-through agency for federal dollars, then federal compliance requirements are paramount.

- Search for grant management software that has strong **security certifications** that require third-party audits, such as a SOC 2 Type 2 certification, and request to see their report to ensure that there are no exceptions you should be leery of.
- **Cloud-based data hosting** for grant management systems is important as it provides secure, reliable, and scalable storage solutions, which can be accessed from anywhere at any time. The provider of the data hosting will also have their own security certifications to make sure you and your applicant's data is protected. Be sure the cloud host is a reputable provider.
- Ensuring the **privacy** of your applicants is crucial. As a responsible organization, it is important to know the necessary compliance certificates that your program requires. Depending on your programs and applicants, there are the five major compliance certificates that you should ensure your grant management software provider have: HIPAA, CCPA, GDPR, FERPA and PCI DSS.

Compliance Certificates

- 1. Health Insurance Portability and Accountability Act (HIPAA)** - This certificate is necessary if your program handles medical or health-related information.
- 2. California Consumer Privacy Act (CCPA)** - If your program involves applicants from California, you must comply with CCPA, which protects their personal data and privacy rights.
- 3. General Data Protection Regulation (GDPR)** - This certificate is mandatory if your program involves handling the personal data of applicants from the European Union (EU) or European Economic Area (EEA).
- 4. Family Educational Rights and Privacy Act (FERPA)** - If your program deals with educational institutions, you must comply with FERPA, which regulates the access and disclosure of student's education records.
- 5. Payment Card Industry Data Security Standard (PCI DSS)** - If your program involves handling payment card information, you need to comply with PCI DSS, which sets out security requirements to protect sensitive payment card data.



- It is important to ensure that the grant management platform you choose supports **user roles and permissions** that align with your program's workflow. This will help to ensure that users only have access to the data and features that they need to perform their job roles and responsibilities, while also minimizing the risk of data breaches and unauthorized access to sensitive information.
- **Single sign-on (SSO)** provides a more secure approach to software access by reducing the risk of password reuse, providing centralized access control, enhancing security measures, and increasing visibility into user activity.
- You need assurance that your grant management system will work when you need it most. **Stability** in grant management software is essential for ensuring uninterrupted access from your applicants and team, minimizing downtime, and preventing costly errors. System crashes, data loss, or other technical issues can have serious consequences, such as delays in award disbursement, mismanagement of funds, and damage to the organization's reputation. Seek a provider with a minimum of the industry-standard 99.9% uptime.

Innovation and partnership

It's important to gain a comprehensive understanding of the company you could potentially partner with for an extended period of time. This includes not only their current products and services but also their dedication to future growth and product development. Inquire about the company's plans for the future, in addition to their history, to fully comprehend their vision and direction. You are looking for software to not only meet your needs for today but to scale with you in the future.

There are a few key factors to consider when looking at a company's innovation:

- **Technical expertise.** The company should have a strong technical background and be purpose-built for grant management. They should be well-versed in the latest technologies and tools that can help develop innovative software solutions.
- **Experience.** Evaluate the company's past experience in developing innovative software solutions. Of course, you want to know the company's client work and experience, but also ask them what innovations they have delivered in the last year.
- **Research and development.** The software company should have dedicated product and program management teams that are constantly exploring new ways to improve their current and future needs.
- **Collaboration.** The company should be willing to partner collaboratively with your team and program to understand your unique needs and challenges, both today and in the future.
- **Support.** Provide ongoing support and maintenance to ensure that the software solution remains up-to-date and relevant over time. This includes regular updates and enhancements to keep the grant management solution current and effective.
- **Scalability.** The ability to develop software solutions that can scale with the needs of your organization as it grows and evolves over time.
- **Training and onboarding processes.** Be sure to seek information regarding the company's approach to implementation which will be key to your success. You may need to confirm specifically if their onboarding time will be able to meet the needs of your first program launch.

Writing your RFP

You've done your research, and now you're finally ready to start drafting your RFP. It's time to put your fingers to the keyboard and bring your ideas to life. With all that preparation behind you, the drafting process should be a breeze. Get ready to take the next step in bringing your project to fruition.

- **Use a template.** To help you get started, [use this template](#) to get ideas of what to include. This template focuses on the RFP questions you may want to include centered around GMS functionality. We assume that your government entity already has a template with a checklist of processes, instructions, and schedules, to include in each RFP you issue. (If you are starting from scratch, www.acquisition.gov/ is a good place to start.)
- **Include a business case.** Outline your business case, goals, and objectives for the software. Name any specific features or functionalities the system must possess to meet your requirements. Also, include an outline of your

desired implementation timeline and the proposed project budget. The RFP should also specify any desired success metrics to evaluate the system's performance and should request information on the vendor's experience in the grant management industry.

- **Keep it short.** Be kind to your evaluators when crafting your proposal. Use checkboxes to easily receive a lot of information without reading through long narratives—especially in areas such as security and compliance. In many cases, a simple check mark and an attachment for proof will suffice.
- **Draft a rubric.** Aligning your rubric/scoring system with your program goals will keep your evaluators from getting lost in the features and instead focused on what matters most. By publishing your rubric in your RFP, vendors can tailor their responses accordingly and not add unnecessary information that doesn't matter to your program (and wastes time and energy from your team).

Here are a couple of quick suggestions to plan for during evaluations.

- **Identify unique features and strengths.** After receiving vendor proposals from your RFP, the final step is to collaborate with your internal stakeholders and reviewers to identify the unique features and strengths of each vendor. Then, use this information to compare and contrast the shortlisted vendors with the highest RFP scores.
- **Schedule product demos.** Consider scheduling vendor product demos for the highest-scoring responses to your RFP. Simply put, you don't know what you don't know. You will learn of features and capabilities that you may not know existed prior to drafting your RFP. Most importantly, you want to ensure that the solution you may invest in looks like something that will be manageable for the program team that will use it daily.



RFP Checklist

- ☐ Do your research (this guide is part of that)
- ☐ Write your business case
- ☐ Include all features and functionality that you require
- ☐ [Use this template](#) to get you started
- ☐ Create a rubric/scoring system
- ☐ Schedule vendor demos for highest-scoring responses

Conclusion

Writing an RFP involves striking a balance between adhering to a process and being flexible to collaboration. While it is good to have a structured approach, recognize that some critical details can get ironed out during contract negotiations. It is important to focus on finding a partner rather than just a vendor that checks all the boxes.

Seek out a partner that shares your values, brings expertise and support that can help foster a long-term relationship that benefits your organization, grant programs and recipients. By prioritizing finding the right partner, you can increase your chances of success in implementing a grant management solution. With the right partner you can achieve your goals and make an impact in your community.

If you want to learn more about what a partnership with Submittable would look like, [schedule a demo today](#).





About the author

Stacey Sveum is a senior product marketer at Submittable who ensures products and features brought to market exceed the needs of grantmakers in the public sector. She meticulously reads and evaluates Grant Management Software RFPs (so many RFPs) to understand customer requirements and stay on top of industry trends.

Submittable 

Since 2010, Submittable has helped organizations collect nearly 20 million applications for thousands of customers all over the world.

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