

Grant Management Software RFP/RFI Template

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Reference this article [A Comprehensive Guide to Writing an Effective RFP for Grant Management Software](#) before drafting your RFP/RFI

[Click here for a Microsoft Word](#) version and [here for a Google Doc](#) version of this template

How to use this template:

- Reference this article [A Comprehensive Guide to Writing an Effective RFP for Grant Management Software](#) before drafting your RFP/RFI
- Remove anything you do not need. The shorter your RFP, the shorter your review/scoring. Also, don't forget to remove the writer tips we included for yourself.
- This template is focused solely on grant management software functionality and requirements. We assume your public entity will have the standard RFP questions, instructions, and procedures.
- We have included a selection of narrative questions and simple check-box responses. Use what works best for your review process.

The more information you can provide about your requirements, needs, and the current process you are looking to improve, the better the responses you will receive.

Consider including the following in your RFP:

- Business case
 - Overall strategic goals and purpose
- Program timelines and parameters
 - When do you need your program launched and ready to accept applications?
 - What level of customization and/or professional services do you prefer or need?
- Program Overview
 - Overview of current and future programs your department oversees
 - Department/agency goals you want to achieve and incorporate, for instance, adding diversity, inclusion, and equity into your grant program.
- Information about who will use the software and how they will use it. This will help your vendors create an accurate cost proposal.
 - Amount of users/team seats
 - Amount of reviewers
 - Grant fund size
 - Current programs and processes and any areas that you would like to have improved upon; eliminated, etc.

- Technical requirements that you know vendors will need to satisfy.
 - Overview statement of what you are seeking in a solution.
 - Example: We are looking to purchase a cloud-based grants management software to improve the processes of our Agency's Community Development Programs. We need a solution that is easy to use, provides user technical support, and offers an easy-to-use customer interface.
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Narrative Responses:

Application Portal

Does your solution offer the design of custom portals that match our branding?

Are applicants able to preview the entire application before working on it?

Do you offer collaborative application capabilities? Can more than one applicant work on one application?

Does your platform have the ability to host multiple grant cycles simultaneously?

What languages are available for the application portal and application?

Applicant Experience

Does your application auto-save?

Is your solution available on mobile? Could an applicant submit their application entirely on a mobile device?

Please describe the features (i.e., chat, portal messaging, email, SMS, etc.) for applicant communication throughout the application's lifecycle.

Can your platform allow applicants to initial or sign individual pages within electronic reports using an approved digital signature platform?

Do you have a process to confirm the eligibility of an applicant/organization?

Can an applicant edit their submission after they submit it?

How does your solution leverage technology to support diversity, inclusion, and equity through the review process and for applicants applying?

Please detail the ease-of-use of your platform for applicants. Include screenshots of your applicant views.

Application Management

Does your solution have the ability to author and create applications, worksheets, and other additional forms?

Can users make changes to grant applications once they have launched?

Can you label and organize applications?

Does the platform have the ability to display/hide application questions based on responses to other questions?

Does the platform have the ability to limit application submissions to invitation-only?

What type of document types and sizes can your platform accept?

Can you confirm if an organization is a certified school, nonprofit, or library?

Does your platform allow for meta-data to be collected with file uploads?

Can you embed table fields within your application for use in budget management?

What functionality does your application have for tagging and sorting applications into categories?

Please detail the ease-of-use of your platform for internal teams. Include screenshots of your administrative views.

Review

Explain how your solution reviews applications to award.

Does your platform offer an automated review of applications?

Are you able to auto-score applications based on a rubric?

Does the platform have the ability to set approval workflows based on associate/team management structure?

Is your solution able to validate data from the application? For instance, revenue/income, address validation, SSN, UEI, EIN, etc.? How does your solution achieve this?

How are applications and documentation viewed? Is this viewed in the product or downloaded?

What are the different user and permission roles within your solution?

Does your software include built-in fraud detection and prevention features?

Funds Tracking and Distribution

Does your product offer the ability to manage funds in a dashboard?

Does your product offer funds distribution?

Does your solution offer the ability to pay grant awardees directly?

What partners do you use for funds distribution?

Reporting

Do you offer support for auditing and financial management?

Please list the standard reports that are available within your platform.

How do you handle requests for additional information from applicants?

Can your solution track changes (deltas and history), including logging what the change is, when the change was made, and who made the change?

Does your platform have ad hoc reporting capabilities?

Is custom reporting available within the software? If so, describe the supported technology (e.g., Snowflake, Tableau, SSRS, Crystal Reports, custom, etc.). Will you have a reporting team that will build custom reports upon our request?

Post-Award

How does your solution address progress reports? Including subrecipient monitoring, budget tracking and reimbursement requests.

What type of compliance and audit-preparedness does your solution or company offer?

Implementation/Professional Services/Customer Service

Please detail out your onboarding and training process and programs.

Please describe the implementation of your product for our organization.

What is the standard implementation timeline? Please specify the number of weeks/months.

Describe your customer support levels. What level of support would you recommend for our organization?

Do we need to contact your organization to change our grant portal and/or application?

Do you offer change management services? If so, please describe.

Certifications

Is your solution VPAT Certified?

What security certifications does your solution provide? HIPAA Compliant?

Do you have a disaster recovery policy?

Data

Can you export data out of your platform? If so, in what formats?

Does your team handle historical grant application migration?

Can your solution use web services to transfer data in real-time to and from the solution?

Do you offer a comprehensive database of all grants that are searchable based on a variety of criteria?

Do you have the ability to store all grant information, including applications and other forms and grant deadlines and due dates?

Where is your data stored?

Have you experienced a security breach? If so, please provide details regarding this breach and how you managed this?

What is your security breach plan?

Company experience and stability

Tell us about the current and future investment in your product. How many personnel work on it?

Do you have a public roadmap available? If so, please share your current plan.

What are the features and capabilities that you have recently launched?

Explain how your solution supports the entire lifecycle of a grant application program.

Checklist Responses:

Technical Requirements:

Category	Vendor Responses
	Please check all responses that apply for your solution within each category. If Other is selected, please detail below.
Solution description	☐ CRM/ERG Module ☐ Commercial-off-the-shelf ☐ Custom build ☐ Hybrid ☐ Enterprise level solution ☐ Purpose-built GMS solution ☐ Software-as-a-service ☐ Other - Please detail Additional Details:
Data Hosting	☐ Cloud-based ☐ Locally-hosted ☐ Hybrid cloud ☐ Multi-cloud ☐ On-premises ☐ Private cloud ☐ Other - please detail Additional Details:

Data Integration

Tip to RFP writer: make sure to include integrations that are mission critical to your program. Write in the name - i.e. PeopleSoft or DocuSign

- ☐ 2-way API
- ☐ Data imports
- ☐ Data exports
- ☐ Native integration
- ☐ Third-party integration
- ☐ Data validation
- ☐ Integrated system audit trail
- ☐ Data warehouse integration
- ☐ Data owned exclusively by customer
- ☐ Data owned by GMS vendor
- ☐ Historical data migration
- ☐ Electronic signature provider
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ Other - please detail

Additional Details:

Retention, security, and recovery

Tip to RFP writer: You can add instructions to vendors to attach all documentation that is checked off.

- ☐ Disaster recovery policy
- ☐ User permission levels access to data
- ☐ Single-sign on
- ☐ Web application penetration test report
- ☐ Other - Please detail

Additional Details:

Certifications and Compliance

*Tip to RFP writer:
Delete any requirements that you do not need or apply to your programs/industry i.e.
If you are in education you need FERPA but probably not HIPAA*

- ☐ ADA Section 508
- ☐ CCPA/CPRA
- ☐ FedRamp
- ☐ FERPA
- ☐ GDPR
- ☐ Soc 2 Type 2
- ☐ HECVAT - Lite
- ☐ HECVAT - Full
- ☐ HIPAA audit report
- ☐ PCI SAQ'A
- ☐ Soc 2 Type 2 third-party audit report
- ☐ StateRamp
- ☐ VPAT
- ☐ Accessibility Conformance Report
- ☐ Other - Please detail

Additional Details:

Reporting within product

- ☐ Comprehensive reporting
- ☐ Personalized dashboards
- ☐ Financial reporting
- ☐ Compliance reporting
- ☐ Impact reporting
- ☐ Internal reports
- ☐ External reports
- ☐ Other - Please detail

Additional Details:

Closeout Features

- ☐ Expenditure tracking
- ☐ Document validation
- ☐ Document compilation
- ☐ Audit preparedness (SF-425)
- ☐ Single-audit preparedness
- ☐ 2 CFR 200 compliance
- ☐ Other - Please detail

Additional Details:

Funds Tracking & Distribution

- ☐ Reimbursement forms
- ☐ Reimbursement process
- ☐ Fund(s)/Budget tracking
- ☐ Fund distribution
 - ☐ ACH
 - ☐ Check
 - ☐ Prepaid card
- ☐ Other - Please detail

Additional Details:

Professional Services

- ☐ Change management planning
- ☐ Document review
- ☐ Internal controls evaluation
- ☐ Risk assessment
- ☐ Project impact assessment
- ☐ Project management
- ☐ Consulting
- ☐ Application design
- ☐ From development
- ☐ Implementation
- ☐ System testing
- ☐ Other - Please detail

Additional Details:

Training

- ☐ Custom training
- ☐ On-demand training
- ☐ Program training for applicants
- ☐ Other - Please detail

Additional Details:

Support

- ☐ Technical support
 - ☐ Phone
 - ☐ Email
 - ☐ Text
- ☐ Programmatic support
 - ☐ Phone
 - ☐ Email
 - ☐ Text
- ☐ Support for
 - ☐ Applicants
 - ☐ Subreceptients
 - ☐ Reviewers
- ☐ Help library
- ☐ Business hours support
- ☐ 24/7 support
- ☐ Other - Please detail

Additional Details:

In-product Communication Features

- ☐ Auto-response templates
- ☐ In-product messaging
- ☐ Activity log
- ☐ Automatic development
- ☐ Email

Additional Details: