



Request for Proposals Grants Management System Selection

Background

[The Children's Defense Fund \(CDF\)](#) is a 501 c3 based in Washington, D.C. with satellite operations in eight states. Its programs reach thousands of K-12 and college students annually as well as faith-based communities and multiple partner organizations. Its activities are supported by grants from individuals, foundations, and corporations. CDF uses Raiser's Edge, Salesforce, and Sage Intacct to track donor and institutional funder interactions and relationships, and for overall financial management.

Scope of Work

The Children's Defense Fund requests proposals that articulate how the firm can assist our organization in identifying and selecting an appropriate system and path that will address our grants management needs. The ideal system will integrate seamlessly into existing in-house systems and identify ways in which to maximize use of those systems to better meet all our data and relationship management needs. The proposal should address the following:

1. Discovery – Meet with key constituents to determine their CRM/data management needs
2. Assessment – Identify what is currently in place and where there are redundancies, gaps in functionality, or underutilization
3. Market analysis – Research solutions currently available in the marketplace that might address the identified needs/gaps
4. Product selection – Produce options with a cost/benefit analysis, along with compatibility for integration and requirements to implement
5. Recommendations – Provide recommendation(s) with rationale and suggested steps for implementation

Deliverables

1. Written report with overview of process, information gathered, analysis and recommendations
2. Process timeline for acquisition and implementation
3. Oral presentation to stakeholder group(s)

Submission process

Interested parties should submit their proposal with the following information. Please supply the information in the order requested to facilitate our review of the qualifications of each firm. Please limit your proposal to a black and white Microsoft Word document of no more than ten (10) pages using 11-point Times New Roman font.



1. **Name and Background** – Include complete name and contact information. If any of the work is subcontracted to another party, please provide the same information for all firms, and indicate who will be the lead firm.
2. **Profile of Firm** – Provide a brief description of the size of the firm(s) and the composition and qualifications of professional staff by level. Include the racial/ethnic and gender demographics of your firm and its leadership. Indicate any local, regional, or national resources available to the team.
3. **Experience** – Describe the experience of your firm (or firms) related to the scope of work outlined above. Provide the names of organizations and contact information for 501(c)(3) organizations for whom you have worked within the past three years (no more than 3).
4. **Key Personnel** – List those key staff directly assigned to this client, setting forth name, job title, duties and responsibilities, and relevant experience. Resumes should be provided for senior leadership assigned and management/supervisory personnel who make up the engagement team. Resumes should include amount of experience, as well as a summary of specific experience with not-for-profit organizations.
5. **Diversity Statement**- CDF believes that diverse and inclusive teams lead to better outcomes. Describe your firm's efforts to recruit, retain, promote, and support people of color. What is your firm's commitment to racial equity and justice? How has your firm showcased a commitment to diversity regarding clients, pro bono work, and hiring practices? How has your firm demonstrated a commitment to support causes of equity and justice for different marginalized groups?
6. **Conflict of Interest** – Describe any existing or potential relationships with board members or employees of the Children's Defense Fund that could affect your firm's independence by creating an actual or perceived conflict of interest. Describe procedures for on-going conflict of interest checks.
7. **Fee Structure** – Provide a standard fee schedule (hours, rates, or other fee schedule) for the personnel who would be assigned to this project. Include an overall not-to-exceed fee for the services described above. The fee is to be inclusive of all out-of-pocket expenses. Describe your billing rates and procedures for technical questions and break down hourly rates by management level.
8. **References** – Offer at least three current references for your work with organizations similar to CDF. Briefly describe the scope of your work for these references, the year



work was completed, and a contact name and telephone and/or email for each one. (This information may be included with #3 above.)

9. **Information on additional services** –Provide any information on additional services that you believe is pertinent and aligns with CDF’s mission, vision, and values.

Selection Process

Proposals will be evaluated on the following criteria:

1. Degree to which technical and business expertise aligns with scope of work
2. Degree to which proposal demonstrates alignment with CDF’s values for diversity, equity, and inclusion
3. Pricing and articulated ROI

After preliminary evaluation of proposals, shortlisted candidates will be invited to present to a selection committee.

PROPOSAL SELECTION TIMELINE

Deadlines and Selection Timing are as follows:

November 29, 2021	Deadline for submitting a proposal
Dec 8, 2021	Short listed firms notified
Dec 13, 2021	Question & Answer Session for Applicants
January 11, 2022	Firm Presentations
January 31, 2021	Firm Selected

Submissions should be made by email to:

Laura Trevino
Director, Accounting
Children’s Defense Fund
ltrevino@childrensdefense.org

About CDF

The Children’s Defense Fund (CDF) envisions a nation where marginalized children flourish, leaders prioritize their well-being, and communities wield the power to ensure they thrive. CDF’s Leave No Child Behind® mission is to ensure every child a *Healthy Start*, a *Head Start*, a *Fair Start*,



a *Safe Start*, and a *Moral Start* in life and successful passage to adulthood with the help of caring families and communities.

We serve and advocate for the largest, most diverse generation in America: the 74 million children and youth under the age of 18 and 30 million young adults under the age of 25, with particular attention to those living in poverty and communities of color. CDF partners with policymakers, aligned organizations, and funders in this service. The Children's Defense Fund is the only national, multi-issue advocacy organization working at the intersection of child well-being and racial justice by wielding the moral authority of programmatic proximity and community organizing to inform public policy. For more information visit www.childrensdefense.org.