



Creating and Protecting Ownership and Economic Opportunity

SELF-HELP CLIMATE CAPITAL, LLC

RESPONSE TO QUESTIONS

SaaS Grants Management and Grant-Making Platform with Integrated Accounting and Reporting Features RFP #1

This Response to Questions is a combination of responses to specific questions from Proposers as well as updates and clarifications from SHCC. This document will be updated periodically with the most recent input at the beginning.

March 11, 2025

General Questions

- 1. Is SHCC a non-profit? Does SHCC have its own EIN? Will the purchase be falling under SHVF?**

SHCC is a non-profit with its own EIN, and the purchase will be made under SHCC.

- 2. How many entities would be in scope for this project? Sage Intacct is a multi-tenant environment, meaning we can accommodate for as many entities as needed in a single environment.**

We anticipate using one entity for a single environment.

- 3. Would you be willing to increase the page limit in order for us to thoroughly respond to the required sections?**

No, please adhere to the 10-page limit. However, the 10-page limit does not include the three required attachments, cover page, table of contents, certifications, pricing, references, or appendices.

- 4. What should the responses look like for Section 3?**

For each subsection, respondents may confirm availability of the requested functions (Yes/No; Available/not Available; etc.) and a short narrative explanation/additional detail if desired. SHCC encourages respondents to provide concise responses that will allow us to understand the functionality and limitations of the proposed service.

5. Do you want a response to section 2 Scope of Services of the RFP, or just Section 3 Proposal Contents?

Respondents should format responses using the components found in Section 3. Such responses should address the requested scope of work found in Section 2.

6. How many users are needed?

Estimated 3 full users and 10 view only users. Specific user count and type may vary depending on platform functionality.

7. Is there a need for a portal for Grant Applicants?

While we would prefer a point of submission portal for grantees, we encourage applications from organizations that may not have portal capabilities at this time.

8. Will a product demonstration/solution presentation be required as part of the process? We are happy to demonstrate the product, but didn't see a timeline for presentation if selected.

Yes, if your platform meets our requirements, we will reach out to you for a demo. This demo will be outside of the RFP Proposals Due Date.

9. What is your expected timeline for a System Go-Live?

Within three months after the contracts and Statement of Work (SOW) are signed.

10. Do you have an expected budget range for your GMS subscription and implementation costs?

Proposed pricing should be within standard industry ranges and include any discounts you provide to nonprofit organizations.

11. Will this RFP process include a Best and Final Offer or a similar step in case price is a factor in selecting the preferred vendor?

Self-Help will review all Proposals based on first-tier evaluation metrics, including price reasonableness, and based on that review, may select a smaller number of Proposals for second-tier evaluation metrics. Self-Help may request additional due diligence materials and interviews with the Proposer as part of the selection process. The final scope of the engagement may evolve after further discussion with proposers, and Self-Help appreciates that scope will affect price. Multiple factors, including price, will be included in the final selection process.

12. Do you intend to migrate your data from your existing GMS into the new GMS?

SHCC does intend to migrate existing data into the chosen solution.

13. If utilizing a Single Sign-On solution, please provide the name of your solution. Is it used for both internal users and external grantees?

Microsoft - Just for internal users

14. Do you intend to utilize additional languages besides English in your Grantee and External Portals?

SHCC may utilize additional languages beside English to provide greater accessibility to potential grantees.

15. Do you grant in multiple currencies? If so, what currency is your base budgeting currency?

No

16. Which systems must be integrated with our platform at launch? Do they have APIs available for integration?

Systems to be integrated into the new GMS may be shared with prospective vendors during a later phase in the process.

17. Does SHCC intend to the Grant Management System to manage revolving loan funds?

SHCC does not intend to use the grants management system for management of the revolving loan fund.

18. Do you intend to utilize your new grants management system for contract generation and execution?

No.

19. Are you looking to integrate the GMS with an accounting or financial management system?

We would like to explore an integration if possible but encourage applications from organizations that may not have that capability at this time.

20. How many budgetary or accounting levels are needed to capture expenses for grantee financial reporting?

Cost Centers, Funding Sources, Program Code, Categories that may be different for financial reporting and grant reporting.

Grant-Making Questions

1. Please describe your grant-making process.

Additional details on grantmaking and contracting procedures may be shared with prospective vendors during a later phase in the process.

2. Ideally, would you like to perform other monitoring activities in the GMS?

Yes, SHCC would like the GMS to include features for monitoring site visits, tracking

interactions, managing milestones and outcomes, tracking risks, and overseeing the budget.

Other Questions

1. Section 3 – Subsection A – AP – 2nd Bullet Point: What is meant by, “payment scheduling”?

Invoices can be approved early, but not paid until the scheduled date of payment

2. Section 3 – Subsection C – 7th Bullet Point: What is meant by, “Identify and address instances of non-compliance”?

Please include any information on the proposed service’s ability to create internal rules based on dollar thresholds, identify specific reporting deadlines, or flag any instances of lagging performance against agreed upon deliverables.

3. Section 3 – Subsection D – 1st Bullet Point: Please provide examples of what, “customizable workflow and task assignment capabilities including setting reminders and alerts” means to you.

Please include any information on the proposed service’s ability to document submission or reporting deadlines, assign internal users as the lead contact for particular profile/grant, generate automated reminder emails to specific users for upcoming deadlines or missing data, and/or generate email specific users of approval requests.

4. Do you have any standard reports that need to be created on a regular basis (e.g., Grant Approval List, List of Approved Grants, List of Payments, etc.)?

Please refer to Section 3 subpart E.
