Comprehensive Grant Management System Request for Proposal

Salve Regina University

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www.Salve.edu

Bid Release Date: 12/20/2024

Deadline for Bid Submission: 1/22/25

Point of Contact: Salve Regina Purchasing Office

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Introduction

From our cornerstone mercy mission to the classic ideals of our liberal arts approach, tradition matters at Salve Regina. It's woven throughout our 80-acre campus, embedded in our historic buildings, and infused in the culture of Newport, Rhode Island.

Tradition at Salve Regina means we remember where we began. Since our founding by the Sisters of Mercy in 1934, we have grown to a community of more than 2,800 undergraduate and graduate students who proudly carry forward our mission in their personal and professional lives. Fully accredited by the New England Commission of Higher Education, we are committed to fueling the imagination and encouraging the academic ambitions of our bright and curious students.

Salve Regina University is seeking proposals for a comprehensive grant management software system to streamline and automate our grant application, tracking, and reporting processes. The selected software must provide the following key features and capabilities.

The requirements below are considered a minimum. Include in your response the modular structure of your system, and the elements included within each module, together with the price per module.

Timeline

- Bid Release Date: 12/19/24
- Deadline for Bid Submission: 1/22/25
- Vendor Presentations: Week of 1/27/25
- Anticipated Vendor Selection: 2/10/25
- Anticipated Contract Award: 2/20/25
- Anticipated Project Commencement: 3/1/25

How to Submit a Proposal

Interested vendors should submit their proposals electronically in PDF format to ***purchasingoffice@salve.edu no later than 1/22/25***. Please include "**Comprehensive Grants Management System – Salve Regina University**" in the subject line. Late responses may not be accepted.

Scope of Work

1. High-Level Features and Functions

1.1.1 Research Opportunities: Provides on-line access to extramural funding opportunities.

1.1.2 Proposal Management: Includes creation, submission, tracking, and reporting of research proposals, including creation and approval of budgets.

1.1.3 Grant Contracts Management: Includes creation, negotiation, and execution of grant awards and subawards, and post-award modifications to those agreements.

1.1.4 Financial Management: Tracks the award status, approved budgets, and expenditures for billing, reporting process and completing the closeout process for research projects. Integrates with our ERP

1.1.5 Compliance Management: Ensures compliance with regulations, policies, and guidelines set by funding agencies and institutions. Includes subrecipient risk assessment and subrecipient monitoring.

1.1.6 Reporting: Generates reports on research activities, financial status, and other relevant information.

1.1.7 Collaboration: Facilitates collaboration among researchers, sponsors, and administrators.

1.1.8 Grant Tracking: Keeps track of grant submissions, awards, and funding information.

1.1.9 Document Management: Provides secure storage and retrieval of important documents, including grant proposals, budgets, and contracts.

1.1.10 Workflow Management: Automates and streamlines research administration processes, including proposal submission, review, and award management.

1.1.11 Analytics and Dashboards: Provides insights and data visualization for decision-making and performance evaluation.

1.1.12 Outside Interest Reporting: A report of an individual's personal, professional, commercial, and/or financial activities, interests, or relationships with an entity/organization external to the University.

1.1.12 Robust user profiles whose data can be used to populate common data fields when creating records in the vendor's SaaS system. Integrations such as leveraging existing University system data (Human Resources); ORCID; CITI; etc.

1.1.13 Functional user dashboards to manage records and data across all products in the vendor's SaaS system installed by the University.

1.1.14 Ability to access raw data within the system, including the ability to manipulate that data, either via direct database access, provided APIs, or import/export functionality.

1.1.15 Ability to generate effort reports and tracking of effort.

2. Detailed Features and Functional Requirements

Provision of a cloud-based Software as a Service (SaaS) system for eRA management for the University to include functions required by the University to fully administer a robust research administration system, including, but not limited to:

2.1.1 Online access to a searchable database of extramural funding opportunities available to institutions of higher education (IHEs) with ability to save and filter searches and transmit email notifications for opportunities of interest.

2.1.2 Proposal development capability, including:

2.1.2.1 Ability for university investigators to create proposals

2.1.2.2 Build detailed budgets

2.1.2.3 Request and collect letters of intent/commitment from outside collaborators

2.1.2.4 Attach relevant documents and electronically route completed proposals for internal workflow approvals

2.1.2.5 Ability for the University to collect proposal-related compliance information and key personnel certifications

2.1.2.6 Ability to send action, reminder or follow-up notifications via email

2.1.4 Proposal tracking capability, including:

2.1.4.1 Ability to monitor proposal submissions for follow-up or other issues

2.1.4.2 Obtain appropriate electronic internal approvals

2.1.4.3 Track conflict of interest disclosure statuses

2.1.4.4 Track proposal statistics such as proposal success rate, and number of funded and non-funded proposals

2.1.5 Award tracking capability, including:

2.1.5.1 Ability to create records to document funded proposal,

2.1.5.2 Track negotiation statuses of award terms and conditions

2.1.5.3 Obtain appropriate electronic internal approvals

2.1.5.4 Evidence formal award acceptance

2.1.5.5 Issue award notices to internal personnel

2.2.5.6 Track award statistics

2.1.6 Project account tracking capability, including:

2.1.6.1 The ability for users (e.g., investigators and fiscal administrators) to view their internal and external funding portfolio

2.1.6.2 View their budget against expenses and encumbrances

2.1.6.3 Monitor cost sharing commitments

2.1.6.4 Create, save, edit, and share projections scenarios

2.1.6.5 Monitor fund burn rate and report on the progress of spending down funds

2.1.7 Subaward tracking capability, including:

2.1.7.1 Ability to create records to document University-issued subawards

2.1.7.2 Relate the subaward records to University (prime) awards

2.1.7.3 Track negotiation statuses of subaward terms and conditions

2.1.7.4 Obtain appropriate electronic internal approvals

2.1.7.5 Issue subaward notices to internal personnel, and track subaward statistics

2.1.7.6 Easily engage sub awardees during the proposal process

2.1.7.7 Tools to monitor subrecipients

2.1.8 Subrecipient data collection capability, including:

2.1.8.1 Ability to capture data from subrecipients as may be required by federal and other laws or regulations, or prime sponsor terms and conditions

2.1.8.2 Capture data required for subaward preparation; to capture data required to conduct subrecipient risk assessments; and to track compliance issues

2.1.11 Conflict of interest (COI) tracking capability, including:

2.1.11.1 Ability to collect COI information and Significant Financial Interest (SFI) disclosures on an annual basis as required by law and University policies

2.1.11.2 Link disclosures to applicable proposal and award records

2.1.11.3 Upload relevant documents including COI management plans

2.1.11.4 Track completion of required training

2.1.11.5 Send automated reminders to COI reporters/reviewers

2.1.11.6 Manage submitted disclosures through a user (admin) dashboard that shows analyses and summaries of data

2.1.12 Conflict of commitment (COC) tracking capability, including ability to collect outside employment and COC information as required by law and University policies

2.1.13 Export control data collection capability, including:

2.1.13.1 Ability to track export-controlled items in use by the University under extramural awards

2.1.13.2 Track export licenses, and

2.1.13.3 Monitor parties of concern

3. Reporting

3.1.1 Reporting capabilities, including ability to generate reports for all of the above within user-specified periods

3.1.2 Create customized reports based on data crossing subject matter areas in the system

3.1.3 Create and save customized reports to run on an as-needed basis

3.1.4 Save and download created reports into Excel and PDF formats

3.1.5 Common reports currently generated by the University include but are not limited to:

3.1.5.1 Periodic (quarterly, annual, ad hoc) number and dollar amount of proposals and awards

3.1.5.2 Proposal and award statistics by sponsor

3.1.6 Please provide any other additional reporting tools offered by your company to encompass all aforementioned aspects of Pre/Post-Award and compliance research activities.

4. Technical and Integration Requirements

4.1.1 Direct integration or data transfer capability with the University's financial management system. (Ellucian Colleague Finance) which supports either REST API or file based SFTP. Integration tools must provide error and audit logs for reconciliation.

4.1.2 Direct integration or data transfer capability with the University's human resources system (Ellucian Colleague HR) which supports either REST API or file based SFTP. Integration tools must provide error and audit logs for reconciliation.

4.1.3 Permission-based access by user or role to be maintained by the University, including ability to view or hide specific modules, sections and data fields within a record.

4.1.4 Provide online access to at least one testing instance, which is a mirror of the production system.

4.1.5 Assist the University, as requested, with testing of the vendor's software to ensure that software setup will accommodate the University's business processes and practices.

4.1.6 Assist the University with set-up of a single sign-on (SSO) integration for the vendor's software.

4.1.7 Ability to make modifications to individual modules or data fields where deemed necessary to accommodate regulatory requirements and the University's business practices, for example, the ability to rename fields, add fields, rearrange placement of fields, change a field's "required" status, make certain fields visible only to certain permission levels, or remove/hide fields.

4.1.8 Provision of detailed user documentation (e.g., module specific manuals) for vendor's software.

4.1.9 Provision of training for vendor's software.

4.1.10 ADA compliant at the current level described by federal and state statutes.

4.1.11 All data transmitted through, or processed and stored in the Contractor’s SaaS system, shall be by secure means and shall be encrypted both in transfer and at rest

4.1.12 Contractor shall treat the data as confidential and shall implement appropriate measures designed to ensure the confidentiality of the data, including, but not limited to, restricting access to only personnel who require access to install and maintain the vendor's SaaS system on behalf of the University.

4.1.13 Contractor must have policies in place to secure data from unauthorized access and to address breaches.

4.1.14 Contractor shall maintain the data on secure servers located within the United States, and maintain network security sufficient to protect the data, and in conformance with generally recognized industry standards and best practices

4.1.15 Maintaining patched environments with appropriate security updates

4.1.16 Conducting regular (two or more annually) third-party vulnerability assessments.

4.1.17 Contractor shall maintain and regularly update its software such that applications remain secure from vulnerabilities identified in updates, upgrades, and bug fixes.

4.1.18 SaaS/Cloud based system

4.1.19 Web Browsers: A web browser such as Google Chrome, Mozilla Firefox, or Safari is needed to access the software.

4.1.20 Operating System: The cloud-based software may be compatible with multiple operating systems, such as Windows, Mac, and Linux.

4.1.21 Security: The cloud-based software should have proper security measures in place, such as encryption, secure data storage, and access controls to ensure data privacy and protection.

4.1.22 Scalability: The software should be scalable to accommodate growing needs and increasing user numbers.

4.1.23 Support SAML SSO via Azure

4.1.24 University data should be maintained in a private tenant distinct from other SaaS clients.

4.1.25 All data stored in the SaaS cloud remains property of the University and the vendor must provide the University with a copy of its data if the University chooses to terminate the software license in the future. Vendor must remove all University data from their system after an agreed upon date.

5. Support and Accessibility

5.1.1 Please send a copy of your Master Services Agreement/Subscription Agreement

5.1.2 Please send a copy of your VPAT form(s) for accessibility

5.1.3 Please send a copy of the HECVAT form for security

5.1.4 Do you have a Service Level Agreement (SLA) for support resolution?

5.1.5 What is the percent uptime that you SLA?

5.1.6 What is the process for implementing upgrades, new features, etc.?

5.1.7 What support is available to our end users once your system is live? Do you provide an end user Learning Management System (LMS) Platform? If so, please describe.

6. Training and Support

The selected vendor will be crucial in implementing the grant management software system, providing training, and offering ongoing support and maintenance. The selected vendor will be expected to work closely with the organization's project team to ensure a successful implementation and adoption of the grant management software system.

6.1.1 Comprehensive training and documentation for administrators and end-users

6.1.2 Implementation and post-delivery support

6.1.3 Dedicated customer support with various channels (e.g., phone, email, online portal)

6.1.4 Ability for end-users to contact support directly (required)

6.1.5 Dedicated Customer Success Manager with regular check-in and access

6.1.6 Dedicated user community

6.1.7 Ongoing software updates and maintenance to ensure optimal performance

RFP RESPONSE ELEMENTS AND FORMAT

The University requires comprehensive responses to every section within this RFP. To facilitate the review of the responses, Respondents shall follow the described response format. The intent of the response format requirements is to expedite review and evaluation. It is not the intent to constrain Respondents with regard to content, but to assure that the specific requirements set forth in this RFP are addressed in a uniform manner amenable to review and evaluation. A response that does not provide all the information requested below may be deemed non-responsive. Your response must concisely contain sufficient information to assure the University of its accuracy and any additional information necessary to summarize the overall benefit of the response to the University. Proposals must include the following information:

1) Table of Contents

a) **The Table of Contents should outline in sequential order the major areas of the proposal, and all pages of the proposal, including the enclosures. The proposal must be clearly and consecutively numbered and correspond to the table of contents.**

2) Proposed experience and qualifications of company and implementation team

a) **In reference to the Scope of Services section, please provide information regarding your firm's ability to accomplish the indicated tasks as it relates to this RFP and provide a proposed solution. Provide a detailed implementation plan and timeline in your response.**

3) Demonstrated quality of the vendor's goods and services

a) **Demonstrate in your submittal, the quality of your company's goods and services as it relates to this RFP and the scope of services. Provide an overview of the product and service as well as any key features in your response. Provide any relevant case studies in your response, as well as any additional information that may be important in selecting a firm as it relates to this RFP.**

4) HECVAT (Higher Education Cloud Vendor Assessment Tool)

a) Provide the vendor's completed HECVAT form for the proposed SaaS service

5) Pricing

a) **Provide vendor's proposed pricing as it relates to this RFP. Include proposed pricing structure, include any subscription or licensing fees, setup, and configuration costs, and any additional fees. Provide proposed pricing on your own company form.**

b) **To the extent possible, present pricing by Grants Management System module. The University may choose to select certain modules for implementation, and/or stagger module implementation to conform with University resource allocations.**

c) **Pricing schedule should include cost for initial implementation (by module) and those for post-implementation, such as on-going subscription, license and/or maintenance, support and training costs.**

6) References

a) **Provide references that support the proposer's ability to provide your company's comprehensive grant management software system to the University including the name of the agency address, contact name, current telephone number, email address and a brief description of services provided. Please provide references preferably from at least three different organizations. References with Colleague experience are preferred.**

7) Exceptions

a) **Respondents must clearly submit with their response written requests for exceptions (if any) to any item or condition required in the RFP.**

8) Questions, Clarifications and Correspondence

a) **The University may have further questions in its evaluation of the proposals. Questions will be posted on the University website.**

b) **The University will respond to all vendor questions and post responses on the University website. Vendors questions may be directed to purchasing@salve.edu by referencing the proposal in the subject line.**

c) **If any addendums to this proposal are required, they will be released to all prospective vendors.**

9) Addendum Acknowledgement

a) **Respondents must acknowledge receipt of any addendums by signing and returning the signature page of the addendum as required in the Questions, Clarifications and Correspondence section above.**

10) Contract Form

a) **Please submit a sample contract that your company uses for this service. We will work with the awarded respondent to negotiate a contract that is acceptable to both parties. If there is a conflict with the contract and the proposal, the proposal will be used. All other documents including the original Request for Proposal package together with all proposal addendums and clarifications and the successful respondents bid documents will be included by reference.**

EVALUATION OF PROPOSALS

After the responses are opened on the established date and time, they will be reviewed for responsiveness. In order for a response to be considered responsive, it must conform to all the substantial material terms and conditions required in the RFP. A response that does not conform to all the substantial material terms and conditions in the RFP will be declared non-responsive and will not be further evaluated.

Responses will undergo an evaluation process conducted by the University. The respondent selected for award will be chosen on the basis of the best evaluated response to the University.