SELF-HELP CLIMATE CAPITAL, LLC ("SHCC")
CLIMATE UNITED FUND ("CUF")
RESPONSE TO QUESTIONS

SaaS Grant-Making and Grants Management Platform (GMP)
RFP #1, Revised

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

_____

Updated April 4, 2025

General Questions

1. **Can we schedule a call with SHCC/CUF stakeholders to better understand your process and for a more in-depth discovery?**
   As this purchase is being funded through a grant, we are required to follow the procurement process outlined in the grant guidelines. Unfortunately, we are unable to communicate with prospective proposers outside of the formal RFP process.

2. **While we understand that SHCC and CUF are separate Non-profit entities, we are still unsure of the intended use of the software between the coalition of organizations.**
   SHCC and CUF intend to enter into separate contracts with the selected bidder for separate iterations of the software. There is no plan to integrate the systems between the entities. The entities have decided to conduct a joint procurement process to increase efficiency and receive the most competitive pricing. Both entities have similar software needs but additional details for each organization will be shared in subsequent stages of the RFP.

3. **Could SHCC and CUF tell us specifically which of the Attachment A provisions would be required for this proposal so we can review this list with the legal team?**
   The funding associated with this RFP is from a federal grant. Consequently, there are a number of "flow down" provisions that must be passed down to our contract counter-parties, if applicable. The successful proposer who enters into a final contract with SHCC or CUF would need to confirm for itself which of these terms and conditions are applicable to its business. However, given that this RFP is for SaaS, it is likely that some

or many of the terms and conditions listed in Attachment A to the RFP would either not be applicable to your entity, or you could easily comply with the terms. For example, some provisions are typically only applicable to certain construction contracts. We encourage bidders to review the applicability described in 2 CFR 200 Appendix II.

4. **Would SHCC/CUF be open to an extended timeline beyond the 3 month timeline?**
    SHCC and CUF are currently aiming to complete the implementation within the planned three-month timeline. However, we understand that project timelines can vary based on different factors. If you believe an extended timeline would be beneficial, please provide details on your proposed timeline and the reasons behind it for our consideration.

5. **Is there a preference or requirements regarding the level and format of user training, self-service configuration training, and support needed?**
    We recognize that individuals have different learning styles, and vendors offer various approaches to training and support. Please provide a detailed description of your training program to include training materials, such as detailed documentation, instructional videos, or digital learning modules. Additionally, outline your pricing structure, including any one-time fees or ongoing cost.

6. **Beyond internal staff, will external users such as grant applicants or auditors require platform access, and if so, can you define the types and expected functionalities?**
    We anticipate external users such as grant applicants will require access to submit relevant materials and monitor status of their award.

7. **Can you specify which third-party accounting systems (if any) will need integration with the new grants management platform?**
    If we integrate our current accounting system with the GMP, our system has well-documented APIs available for use.

8. **Are SHCC and CUF non-profit organizations? Do SHCC and CUF have their own EINs? Which entity will the purchase be falling under?**
    SHCC and CUF are each non-profit entities, and both SHCC and CUF have their own EIN. The purchase will be made under SHCC. CUF, a separate non-profit entity, may also purchase a platform under its own contract.

9. **How many entities would be in scope for this project?**
    SHCC and CUF anticipate using one entity each for two separate organizations.

10. **Would you be willing to increase the page limit?**
    No, please adhere to the 10-page limit. However, the 10-page limit does not include the

three required attachments, the GMP RFP Section 3 Subsections A to G Response Matrix, cover page, table of contents, certifications, pricing, references, or appendices.

11. **What should the responses look like for Section 3 Subsections A to G?**
For Section 3 Subsections A to G, respondents may confirm availability of the requested functions (Yes/No; Available/not Available; etc.) and a short narrative explanation/additional detail if desired using the provided RFP Response Matrix. SHCC and CUF encourage respondents to provide concise responses that will allow us to understand the functionality and limitations of the proposed service.

12. **Do you want a response to section 2 Scope of Services of the RFP, or just Section 3 Proposal Contents?**
For Section 2, respondents may confirm availability of the requested functions (Yes/No; Available/not Available; etc.) and a short narrative explanation/additional detail if desired using the provided RFP Response Matrix. SHCC and CUF encourage respondents to provide concise responses that will allow us to understand the functionality and limitations of the proposed service.

13. **How many users are needed?**
Estimated 3 full users and 10 view only users for each organization. Specific user count and type may vary depending on platform functionality.

14. **Is there a need for a portal for Grant Applicants?**
While SHCC and CUF would prefer a point of submission portal for grantees, SHCC and CUF encourage applications from organizations that may not have portal capabilities at this time.

15. **Will a product demonstration/solution presentation be required as part of the process?**
Yes, if your platform meets our requirements, SHCC and/or CUF will reach out to you for a demo. This demo will be outside of the RFP Proposals Due Date.

16. **What is your expected timeline for a System Go-Live?**
Within three months after the contracts and Statement of Work (SOW) are signed.

17. **Do you have an expected budget range for your GMP subscription and implementation costs?**
Proposed pricing should be within standard industry ranges and include any discounts you provide to nonprofit organizations.

18. **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?**
SHCC and CUF 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. SHCC or CUF 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 SHCC and CUF appreciate that scope will affect price. Multiple factors, including price, will be included in the final selection process.

19. **Do you intend to migrate your data from your existing GMP into the new GMP?**
    SHCC and CUF do intend to migrate existing data into the chosen solution.

20. **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

21. **Do you intend to utilize additional languages besides English in your Grantee and External Portals?**
    SHCC and CUF may utilize additional languages beside English to provide greater accessibility to potential grantees.

22. **Do you grant in multiple currencies? If so, what currency is your base budgeting currency?**
    No

23. **Which systems must be integrated with our platform at launch? Do they have APIs available for integration?**
    Systems to be integrated into the new GMP may be shared with prospective vendors during a later phase in the process.

24. **Does SHCC intend to the Grant Management System to manage revolving loan funds?**
    SHCC and CUF do not intend to use the grants management system for management of the revolving loan fund.

25. **Do you intend to utilize your new grants management system for contract generation and execution?**
    No.

_____

Grant Management and Grant-Making Questions

1. **Is there a current pre-award solution that you are using today for managing your proposals for grants?**
   Both organizations use commonly used pre-award solutions, such as Microsoft products

or Airtable, that can easily integrate data with the new GMP.

2. **What specific data will be migrated from your current grants management platform to the new grants management platform? What is the approximate data volume and historical depth expected for migration?**
Data (qualitative and quantitative) to be migrated includes responses to applications, grant report responses, data fields, and submitted documents (excel, pdf, etc.). The data volume is unknown, however, there should be around 6 months' worth of information at the time of migration.

3. **Can you share the expected annual budget, total amount granted out, total number of grants expected to be granted out?**
Additional information will be shared in subsequent stages of the RFP

4. **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.

5. **Ideally, would you like to perform other monitoring activities in the GMP?**
Yes, SHCC and CUF would like the GMP 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 Technical: For "all operations available in the user interface should be available in the API", can you please give us examples beyond updating data within the system are you asking for the ability to take actions like approve a grant via the API instead of in the platform?**
The primary need is to pull data for reporting and to exchange data with other systems, so they can stay in sync without multiple manual updates. Most of these are read-only operations, but we could update data in the Grants Management Platform via API in the cases where the data originates from other systems or from a spreadsheet. Or during implementation, we need to mass upload data from our current systems with available APIs or spreadsheets. Not every action in the software needs to be available via API but being able to read most or all data fields is essential, and being able to update most data fields is ideal.

2. **Section 3 – Subsection Accounting System – AP: What is meant by, "payment**

scheduling"?
Invoices can be approved early but not paid until the scheduled date of payment.

3. **Section 3 – Subsection Grant-Making – Grant-Making Post-Award Monitoring – Compliance & Reporting Tracking - 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.

4. **Section 3 – Subsection Workflow: 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 subsection Reporting.

_____