

REQUEST FOR PROPOSALS

For a consultant to evaluate and recommend a new, grant database solution to enhance workflow for an economic development foundation.

RESPONSES DUE BY NOON, MAY 19, 2021

About the Golden LEAF Foundation

In 1999, the North Carolina General Assembly established The Golden (Long-term Economic Advancement Foundation), Inc. (“Golden LEAF”) to administer funds received by the state under the Master Settlement Agreement with tobacco manufacturers. Golden LEAF is governed by Articles of Incorporation that were approved by the General Assembly. For twenty years, Golden LEAF has used its funds to build economic opportunity across North Carolina through leadership in grantmaking, collaboration, innovation, and stewardship as an independent and perpetual foundation.

Golden LEAF focuses on funding projects that address critical issues facing rural, tobacco dependent, and economically distressed communities in North Carolina, including educating students and training workers to meet the demands of today’s employers; constructing critical infrastructure necessary to create jobs and expand industry; addressing needs of the agriculture community and developing new markets and opportunities for North Carolina farmers; and awarding scholarships to students from rural communities to attend both two and four-year schools. Since 2016, Golden LEAF has also administered funding from the State to assist communities suffering damage from Hurricanes Matthew, Florence, Michael, and Dorian. A complete list of Golden LEAF’s grants is available here:

<https://www.goldenleaf.org/grant-search/>. Golden LEAF also manages the investment of its corpus and uses the income from its investments and state appropriations to fund its grantmaking.

Golden LEAF is governed by a 15-member board of directors that is appointed by the North Carolina Governor, Speaker of the House, and President Pro Tem of the Senate. Its staff of 18 is led by President and Chief Executive Officer Scott T. Hamilton. Golden LEAF’s office is in Rocky Mount, North Carolina.

Request for Proposals

The Golden LEAF Foundation is seeking proposals from qualified consultants to work with staff to evaluate and recommend a grant management solution (or enterprise management

system) that will replace the organization's existing Blackbaud Grantmaking for Foundations with a different solution, and to recommend enhancements to workflow effectiveness and efficiency within the programs function and between programs and administrative operations. The solution should be secure; flexible; easy to use, configure, and maintain; support the integrity of each step in sequential processes; incorporate some historic data; and, accommodate growth at the Foundation over the next decade. While Golden LEAF does no fundraising, CRM is critical to both our programs and external affairs teams. The solution provider should be financially stable, accessible, and have a record of responsiveness to its customers.

Scope of Work

Golden LEAF expects the evaluation process to include at least the following elements:

- Methodology for evaluation and recommendation process for a grant management solution ("GMS"), including specific criteria to be evaluated, and for programs workflow improvements with opportunities to incorporate suggestions of Golden LEAF staff
- Work session with Golden LEAF staff members to understand programs workflows, processes, and "pain points"
- Evaluation of approximately six (6) GMS/foundation enterprise management solution providers including Fluxx, Salesforce, and Wizehive.
- Work session with Golden LEAF staff to discuss findings and obtain staff feedback
- Preparation of evaluation/recommendation document—including writing, editing, and layout of the document—with an executive summary, description of methodology, evaluation results (including a comparative table of findings), recommendations for a GMS (with the underlying logic for the recommendations) and for workflow improvements, and the supporting documentation for recommendations made (which may include interview summaries or notes from conversation with current or former users of grant database software, company research, etc.)
- Presentation of evaluation and recommendations to Golden LEAF staff members with the opportunity for staff members to ask questions
- Additional or different elements of the evaluation/review process recommended by the consultant and agreed to by Golden LEAF

Qualifications

Golden LEAF seeks a consultant with demonstrated experience successfully evaluating and/or recommending GMS providers for not-for-profit, governmental, and/or philanthropic organizations and familiarity with some or all of Golden LEAF's programmatic priority areas of economic development, workforce preparedness, and agriculture.

The consultant will also possess the following qualifications:

- Experience gathering and utilizing data to inform GMS product selection and implementation
- Experience in workflow process improvement
- Ability to provide an unbiased evaluation of GMS providers based on an established set of criteria
- Ability to understand and incorporate unique needs of Golden LEAF, especially its programs function, in the assessment of GMS providers and overall recommendations
- Ability to solicit input from individuals with first-hand knowledge of grant management solutions, from developers to users
- Detailed knowledge of the grantmaking lifecycle
- Presence in North Carolina preferred

Proposal

Proposals must include the following:

- 1) Work plan: Provide a detailed description of the activities to be conducted by the consultant in order to complete the requested scope of work, including:
 - specific activities to be conducted;
 - a timeline for the activities at each stage; and,
 - milestones and deliverables tied to those activities.
- 2) Consultant qualifications and roles: Describe the consultant’s qualifications to conduct the RFP scope of work activities, including expertise, knowledge, and experience conducting similar or related work.
- 3) Previous work product: Include at least two examples of written work similar to the document requested by this RFP.
- 4) References: Include three references of individuals or organizations who can address comparable product and workflow analysis done by the consultant.
- 5) Personnel: Information about the key personnel, whether employees of the consultant or contractors, that the consultant expects to be directly involved in the project and descriptions of their roles and qualifications. If a group or affiliation of consultants will conduct the evaluation/recommendation process, indicate which consultant will have primary responsibility for implementation of the work and activities each consultant will conduct.
- 6) Budget/cost proposal: A detailed budget for the entire project and each major component of the project.

Timeline

April 28, 2021	RFP issued
May 19, 2021	NOON - Deadline for submission (see below for details)
May 24, 2021 (approximate)	Finalists selected

June 1, 2021 (approximate)	Interviews with finalists (location TBD: virtual or in-person in Rocky Mount, NC)
June 10, 2021 (approximate)	Selection of consultant complete and contract start date
August 13, 2021	Evaluation and recommendations complete

Proposal Evaluation

Golden LEAF will select the proposal that it feels will deliver the highest quality deliverables at the best value. The cost of engagement is not expected to exceed \$25,000. The decision will be made through a competitive process that includes factors such as:

- Qualifications of consultant
- Demonstrated understanding of the objectives of this process
- A workplan that details project activities, milestones, and deliverables
- Budget includes detail regarding costs anticipated for each stage of the workplan
- Background in database evaluation and workflow improvement
- Background in or demonstrated understanding of subject areas relevant to Golden LEAF's work
- Quality of writing and work product provided as samples
- Creativity and analytical ability
- Cost effectiveness of proposal

Submission

Complete proposals are due by NOON Eastern time on Wednesday, May 19, 2021. Proposals must be submitted by e-mail in .pdf format to Terri Bryant Adou-Dy at tbryant@goldenleaf.org. Submission by mail, fax, or any method other than e-mail to the address above will not be accepted.

It is the responsibility of the respondent to ensure that Golden LEAF received the submission.

Inquiries

Inquiries concerning this RFP should be submitted to Terri Bryant Adou-Dy, Director of Programs and Program Administration, by Wednesday, May 12, 2021, at tbryant@goldenleaf.org.

Additional Information

- 1) All costs incurred in responding to this RFP are the responsibility of the respondent and will not be reimbursed by Golden LEAF.

- 2) Golden LEAF reserves the right to not select a firm to implement this project or to select a firm for a scope of work that differs from the scope of work described in this RFP.
- 3) Golden LEAF will negotiate a written contract with the candidate selected to conduct this evaluation/recommendation process.
- 4) Golden LEAF is subject to the North Carolina General Statutes regarding public records. North Carolina's public records laws open to public inspection most of the records, including e-mails and other electronic communications, in Golden LEAF's possession. Information regarding certain exceptions to required disclosure of public records applicable to Golden LEAF is available here: https://www.goldenleaf.org/wp-content/uploads/2018/03/public_records.pdf