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Submissions due: April 18, 2025

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## **Rotary Charities of Traverse City Salesforce Grant Portal Project Summary**

### **About Rotary Charities of Traverse City**

Working in partnership with changemakers, Rotary Charities provides funding, learning, and connections to address our region's complex problems and create community assets for all. We support 501(c)3 nonprofit organizations, Native nations, local units of government, and school districts that provide services in Antrim, Benzie, Grand Traverse, Kalkaska and Leelanau counties.

### **Introduction**

Rotary Charities of Traverse City is seeking a qualified consultant to support the redesign of our current Salesforce system and implement a grant portal site utilizing Salesforce Experience Cloud to simplify and create a more accessible grant application experience.

Currently, Rotary Charities manages grants and the application process using the Salesforce Nonprofit Success Pack alongside external platforms for application submission, reviews, agreements, and reporting, with supporting documents stored separately. These systems operate independently and are not integrated with Salesforce.

The redesign of the current system and utilization of Salesforce Experience Cloud will create a more efficient process for applicants throughout the grants management lifecycle, enable grant staff to manage engagements with clarity, and provide real-time visibility into application process.

This project will be a collaborative effort, with a Rotary Charities staff member working alongside the consultant to support implementation and ensure alignment with organizational needs. Rotary Charities is committed to fostering diversity, equity, and inclusion in all aspects of our operations, including procurement and contracting. We encourage proposals from businesses owned by women, veterans, and BIPOC (Black, Indigenous, and People of Color) individuals.



## **Goals & Objectives**

The redesigned Salesforce system and new grant portal will centralize all grant-related activities into a seamless platform, ensuring a user-friendly experience while optimizing both efficiency and security.

This project seeks to achieve the following outcomes:

- Simplify the grant lifecycle by consolidating processes such as application submission, review, approval, and closure into one platform.
- Develop engagement tools that enable quick, transparent interactions between applicants and the grant team.
- Strengthen data integrity by creating a secure system that maintains proper storage, easy retrieval, and reliable tracking of all application information.

In addition, the following design elements and functionalities are priorities:

- Secure login system for applicants and grant team members.
- Dynamic and adaptable application forms for different grant opportunities and final reporting requirements.
- Safe and efficient submission of all required documentation
- A dedicated portal for reviewers to access applications, submit comments, and track scores.
- Dashboards and reports for tracking applications and grant impact.
- Integration with email and document management platforms.

## **Proposal Submission**

Interested vendors are invited to submit their proposals by April 18, 2025. Proposals should include the following:

- Background and experience.
- Approach to meeting Rotary Charities' objectives.
- Detailed timeline and milestones, with an anticipated project start of summer 2025.
- Cost breakdown, including additional services or fees, such as integrations and ongoing maintenance and support.

## **Evaluation Criteria**

Proposals will be evaluated based on the following criteria:

- Experience and expertise designing, configuring, and implementing Salesforce Experience Cloud.
- Alignment with Rotary Charities' goals and objectives.
- Proposed approach and methodology.
- Cost-effectiveness and value proposition.
- References and past performance.



## **Disclaimer**

The information contained in this Request for Quotation (RFQ) is provided for informational purposes only. Submission of a quotation in response to this RFQ does not guarantee acceptance or award of a contract by Rotary Charities of Traverse City.

Rotary Charities of Traverse City reserves the right to reject any or all proposals received, to waive any informalities or irregularities in the proposals, and accept or negotiate any quotation deemed to be in the organization's best interest.

All costs associated with the preparation and submission of a quotation in response to this RFQ are the responsibility of the vendor. Rotary Charities will not be liable for any expenses incurred by vendors in relation to the RFQ process.

Submission of a proposal indicates acceptance of the terms outlined in this RFP/RFQ.

## **Contact Information**

For inquiries and submission of proposals, please contact Kendra Luta, Grants and Learning Manager, at [kluta@rotarycharities.org](mailto:kluta@rotarycharities.org).