Equalis Group/Sourcing Alliance Grant Management Program Procurement Process

Why did Equalis Group/Sourcing Alliance Develop a Grant Management Program?

Many Equalis Group/Sourcing Alliance members i) award and administer grants, ii) pursue and receive grants, or iii) both (for example, receiving block grants from state or federal agencies, distributing those funds to multiple recipients at the local level, and reporting back to the original block grant funder). Managing grants, whether as a grantor, grantee, or both, became much more complicated with the passage of the federal Digital Accountability and Transparency Act (**"DATA Act"**) in 2014. The DATA Act requires federal spending data (including grant dollars awarded) to be aggregated, reconciled, and published to create greater fiscal accountability and transparency of taxpayer dollars at the national level.

As part of Equalis Group/Sourcing Alliance's continued commitment to make it easy for our members to fulfill their missions efficiently and cost-effectively, Equalis Group/Sourcing Alliance decided to develop a full lifecycle grant management program. Our program specifications adhered to the federal Data Act regulations, while also addressing each of the following common pain points that our members identified throughout the lifecycle of managing grants, whether as a grantor or grantee:

- **Finding Grant Opportunities** – difficulty in identifying or overlooking grants applicable to your city, county, state, special district, school, or non-profit organization.
- **Responding to Grant Opportunities** – inefficiencies in developing and submitting responses to identified opportunities, including repurposing content previously developed for similar grant applications.
- **Receiving and Scoring Grant Applications** – managing the influx of high volumes of grant applications and facilitating the work of numerous individuals who are often in different physical locations, involved in the scoring process.
- **Notifying Applicants of Grant Awards** – ensuring that all grant applicants are accurately notified of the status of their applications and documenting those communications for audit purposes.
- **Reporting Against Grant Metrics** – difficulty in measuring, recording, and tying grant-related activities to grantor performance requirements.
- **Managing Grant Awards and Grantee Reporting** – receiving grantee reporting, auditing those reports, ensuring that grantees are meeting their grant-related obligations/deadlines, and approving additional distributions.
- **Forfeiting Funds** – failing to meet grant requirements and/or submit required reporting completely or in full, thereby not qualifying for additional drawdowns.
- **Failing Audits** – ensuring the proper recording of grant data for audit purposes.
- **Aggregating Grantee Reporting** – assembling grant-related data easily and in one place to consolidate all grant-related data and reporting for internal and external purposes.

The Illinois State Treasurer Office (**the "State Treasurer"**) conducted an extensive procurement process for grant management software and services and awarded the contract to StreamLink. The State Treasurer and Equalis Group/Sourcing Alliance joined forces to make the State Treasurer's contract award available to Equalis Group/Sourcing Alliance members.

Why did the Illinois State Treasurer's Office Conduct an RFP for Grant Management?

The Illinois state legislature passed the Charitable Trust Stabilization Act in 2011 to create a special fund in the Illinois State Treasurer's Office for the purposes of awarding grants to in-state non-profit organizations providing services to economically depressed areas. The Illinois State Treasurer's Office is responsible for awarding and administering these grants. The Charitable Trust Stabilization Act established tight timeframes to initiate the first round of the grant application and funding cycle.

The State Treasurer assembled an internal 12-person team to develop processes for soliciting, receiving, and scoring grant applications, and then managing the grants awarded through this program. The team implemented the process manually in the first year of the program. The State Treasurer received more than 300 grant applications, each of which had to be physically delivered by staff members to each member of an 11-member scoring committee to ensure the security of the data.

The team quickly determined the manual implementation of the grant process was cumbersome and prone to potential error. The team initially relied upon a spreadsheet-based approach and spent a significant amount of time hand-delivering grants to the scoring team.

The State Treasurer determined that finding and implementing a software-based solution to manage the receipt and scoring of grant applications that could also be leveraged by both the grantees and all grantors to manage the grants once awarded was a critical next step for the program.

The State Treasurer formalized its process as a set of requirements, developed a request for proposal **("RFP")** for grant management software and services, and issued the RFP to conduct a nationwide search for the optimal provider. A critical component of the State Treasurer's search was to find a provider whose solution could handle both the receipt and scoring of grants, as well as the ongoing management of grants and grantees once the grants were awarded.

What was the Procurement Process that the Illinois State Treasurer's Office Followed?

The State Treasurer began by developing a set of detailed specifications based on its original process design and findings from conducting the first round of grant evaluations and awards manually. The specifications focused on implementing a software-based solution that enabled efficient and accurate processes for i) soliciting, receiving, and scoring grant applications, and ii) managing grants once awarded. The criteria took into consideration the background and experience of respondents, the cost-effectiveness of the proposed solution, the ease of implementing and using the solution, data security, permission-based access, and the end-to-end capabilities of the solution (from receiving grant applications through scoring, award, reporting, and ongoing grant management).

The State Treasurer received six proposals and evaluated each vendor against these criteria following an exhaustive, ten-step procurement process conducted in accordance with the public sector procurement guidelines of the State of Illinois. The State Treasurer narrowed the six vendors down to multiple finalists who were invited in for a product demonstration and intensive interview. The State Treasurer sought a solution provider with both a highly effective software tool and extensive industry knowledge to help guide the State Treasurer in refining and improving its grant management process.

The State Treasurer awarded its grant management software and services contract to StreamLink Software, Inc. to purchase AmpliFund, StreamLink's flagship grant management product, as well as a range of StreamLink support and management services.

Why did the Illinois State Treasurer's Office Select StreamLink as their Vendor?

The State Treasurer selected StreamLink as its vendor because of StreamLink's demonstrated industry expertise, deep knowledge of the grant management process, experience in providing organizations with the right grant management software solution configurable to meet their individual needs, and ongoing support. The State Treasurer determined that StreamLink's team and AmpliFund product met and exceeded the following RFP requirements. StreamLink:

- Delivers a proven, flexible and configurable system with an easy-to-use interface for both the State Treasurer and grant applicants/awardees.
- Provides a reliable, secure, and fully auditable system.
- Offers detailed reporting capabilities to include annual activity reports and date-specific activity reports through the grant application, scoring, award, and management lifecycle.
- Provides the ability to import all existing grant-related data from various word processing and spreadsheet files into AmpliFund quickly and accurately.
- Is available and accessible to users 24 hours per day, seven (7) days a week from any Internet-connected device.
- Requires little-to-no staff time to maintain, repair, or upgrade software because AmpliFund is a remotely hosted software-as-a-service solution.

The State Treasurer partnered with Equalis Group/Sourcing Alliance to make this contract award available to Equalis Group/Sourcing Alliance members nationwide.