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Freedom Fund Background

The Freedom Fund (FF) is a global fund with the sole aim of helping to end modern slavery.

We are a catalyst in the global effort to end modern slavery, working in the countries and sectors where it is most prevalent and invest in and partner with organisations and communities on the frontlines of ending slavery and exploitation.

By partnering with survivors and those at risk of slavery as well as visionary investors, governments, and anti-slavery organisations, we bring together the knowledge, capital that will be needed to dismantle the systems that allow slavery to exist and thrive.

Through our investments and support, we aim to shift power, so that frontline organisations and communities can shape and drive the change required to bring modern slavery to an end.

In the last 5 years, the Freedom Fund has given out over $37 million in grant funding.

Project Background

The Freedom Fund currently records its active and inactive outgoing grants manually, via an Excel spreadsheet (known internally as the ‘grants database’), with payment information stored and processed by Business Central.

It is recognised that a Grant Management System (GMS) is required to better support our Programs and Research Team managing most aspects of the grant process (detailed later) and the Finance Team managing / issuing payments via Business Central.

A detailed analysis was carried out by an external consultancy, taking into account Freedom Fund’s internal systems and future requirements. As a result of this analysis, coupled with the Freedom Fund’s existing use of Salesforce CRM, Salesforce GMS was proposed. This was reiterated following an investigation of GMSs used by similar organisations.

Freedom Fund Project Team

The Freedom Funds core project team are shown below and are complimented by a dedicated working group from relevant departments who will be called upon as and when required.

- Michel Agbodjinou (project co-lead)
- Hannah de Ville (project co-lead)
Request For Proposal:
Grant Management System

- Holly Harridence
- Reimi Pieters

Current Process for Recording / Management of Grants

Incoming Grants

The Strategic Partnerships / Fundraising Team currently uses a combination of Salesforce (CRM) and grant-maker / grants management / reporting systems to manage incoming grants. The use of Salesforce for this purpose is primarily historic and has certain benefits (e.g., Salesforce also being used by the team for contact management) but also has limitations for managing grants.

Outgoing Grants

The Freedom Fund’s Programs & Research programs are responsible for commissioning and granting to our partners. This includes:

- Managing most aspects of the grant process
- Writing Requests for Proposals (RFPs)
- Reviewing applications
- Carrying out due diligence including sanctions checks
- Writing and issuing grant agreements
- Reporting and monitoring
- Working with the Finance team to manage / issue payments through Business Central

The Freedom Fund has approximately 130 active grants across 100 partners. This includes frontline / implementing partners, as well as other partners such as international NGOs, technical assistance providers and research partners.

The management of outgoing grants at the Freedom Fund is currently a manual process managed discreetly on Excel (mainly used for record-keeping and basic reporting) and Business Central (to release payments to partners). Specific staff members are allocated custodianship of these two gateways. However, in recent years, with the proliferation in kinds of grants and partners, it has become necessary to find a grant making solution that provides an interface to the two parts of the process, maintains a historical record of payments made to grantees, and enables a structured monitoring and documentation process so that data is available in easily usable ways to a range of internal stakeholders and decision makers.

The current RFP is to identify a software developer to enable the Freedom Fund to adapt Salesforce for this purpose, and train internal teams to optimise its usage.
**Project Scope, Requirements, Functionality & Usability Criteria**

The overall requirements documents, and associated process maps are available upon request.

However, it should be noted that the development / implementation of the solution is to be split into current and future requirements and necessities / nice-to-haves which are detailed below. The developer should recommend the best approach for development (e.g., phased process) based on the priorities outlined:

**Summary of key priorities**

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<th>Functionality &amp; Usability Criteria</th>
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<td><strong>Support Customer Relationship Management</strong> – enable The Freedom Fund to hold contact information centrally, manage the relationships with each contact and organisation, and hold a communications history of emails, meetings, and other engagement, as well as specialist areas of interest</td>
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<td><strong>Support multiple grant types</strong> – facilitate creation and use of several grant management workflows, recognizing that the initiatives have different types of grants, which are supported differently</td>
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<td><strong>Support end-to-end grant management</strong> – manage the process from the first point of contact to completion and evaluation of the project, including grant award and contracts, scheduling payments, monitoring, and reporting</td>
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<td><strong>Supports the application process</strong> – manage the process including submitting multiple iterations of applications and recording additional information over time, holding supporting documentation from the moment of the first contact to the review and approval of the grant</td>
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<td><strong>Support grant decision-making process</strong> – clear process steps for staff to track applicant journey, ensuring work is assigned to correct staff for authorization as required and reduce duplication of work</td>
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<td><strong>Support accurate reporting</strong> – provide reliable data and reporting in real time for different audiences about applications, grants and projects, and feedback</td>
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Support impact reporting – enable staff to quickly produce qualitative and quantitative reports and information about the grants and projects by theme/scheme and for funder as required

Manage multiple funding streams / grant types – support the various funding initiatives within an overarching grant management process for consistency and accuracy

Provide flexibility for the future – give The Freedom Fund confidence that the solution can support new (as yet unknown) initiatives developed by them and funding partners

Links grants to partners to the source of funding – staff can see when a project is being funded by a major donor or an institutional grant paid to The Freedom Fund

Is easy to use – all staff are happy that the system is supporting them in their work, are comfortable using the system, the system meets their specific needs with minimal support and guidance

For discussion

Integrate with finance system – integrate with the finance system, Microsoft Business Central, for grant payment scheduling and for accurate financial reporting. Please note that although this is not included above, it is to be considered whilst developing and implementing the overall solution.

Web portal for applicants – a self-service area for applicants to submit applications and monitor its progress from submission to decision, whilst still allowing for more traditional methods of sending in applications, which better support non-English speaking organisations.

*This functionality could be added at a later stage and not needed in the first part of the implementation.*

Information Requested

Please provide the following information:

- An executive summary of the RFP response
Request For Proposal:
Grant Management System

- A corporate profile with a general overview of the company
- Copy of latest published financial accounts
- Full company details e.g. name, contact details, certifications, accreditations etc
- Details of experience in providing services relevant to this tender
- An overview of all software products available, with emphasis on the recommended software solution for this RFP
- The names of the modules / applications and the version numbers, included within the recommended software solution.
- The roles, role descriptions and number of staff that would be allocated to providing support to this project.
- Qualification and experience – if there are requirements that you are unable to meet, please describe alternative solutions or explain why this will not affect achievement of the FF objectives.
- State how the recommended solution can meet the requirements.
- Any relationships or accreditations you have with the proposed grant management system products.
- A technical proposal of how the recommended software solution would operate.
- An outline implementation project plan, including project methodology, approach, project phases, time scales, deliverables etc.
- Outline of process for post go-live bug-fixing (incl. developer response times)
- State whether your proposed solution relies on outsourcing or contract workers and where relevant, name / describe the organisations being contracted.
- Recommended project management requirements for a project of this size, nature, and complexity
- Recommended system and software user training services and their costs
- A schedule of license costs
- Recommended implementation consultancy and assistance services and their costs
- Details of additional bespoke developments, if required
- Details of maintenance and support, different levels of support and costs
- Details of any Third Parties/Sub-Contractors you would intend to use in the provision of services to the FF.
- A proposed Service Level Agreement
- A list of (at least) two reference sites, with contact details, where the proposed solution is being implemented or running live, that may be video conference or visited.
- A schedule of all fees (including contract or outsourced workers) and the estimated project costs setting out clearly what is included and what is exempt.
- Any conflicts of interest that may exist in relation to the service contract with the Freedom Fund
Any additional services that you offer that you feel may be suitable to the FF.

Freedom Fund will undertake the evaluation of your proposal based on the following criteria:

- Ability to meet the requirements set out.
- Cultural fit with our organisational objectives and values
- Evidence of proactive service delivery and commitment to excellent customer service
- Qualifications / competency of key staff allocated to the account.
- Responsiveness of incident management
- Ability to provide full service once appointed.
- Financial stability
- Demonstration feedback
- Best overall value for money
- Evidence of similar projects completed for other clients.

Should you be successful or not, you will be notified by the end of July 2023.

Further background: The Fund Staff Structure

The Freedom Fund currently has programs in Bangladesh, Brazil, Ethiopia, Indonesia, Kenya, Liberia, Myanmar, Nepal, Nigeria, and Thailand. With offices in the UK, which is where most staff are based, as well as in the United States and Ethiopia. Most employees currently split their time between the office and home, and this hybrid working arrangement is likely to continue for the foreseeable future.
The Freedom Fund currently has 90 team members which are made up of the following:

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<th>No</th>
<th>Teams</th>
<th>Country</th>
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<tr>
<td>5</td>
<td>Senior Leadership Team including CEO and Directors</td>
<td>UK &amp; USA</td>
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<td>19</td>
<td>Operations &amp; Finance</td>
<td>UK, USA, and Ethiopia</td>
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<tr>
<td>11</td>
<td>Strategic Partnerships / Fundraising &amp; Communications</td>
<td>UK &amp; USA</td>
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Questions about the RFP and request for additional documents

Should you have any questions relating to this RFP before the submission deadline, please contact Holly Harridence at hharridence@freedomfund.org copying Hannah de Ville at hdeville@freedomfund.org and Michel Agbodjinou at magbodjinou@freedomfund.org and these will be responded to in a timely manner.

Additional documents available include:

- Requirements Document
- Process maps for:
  - Grant application (incoming and outgoing)
  - Process for grant awards and contracts
  - Process for delivery of projects
  - Process for project completion and follow up
  - Process for annual budget and management accounts
RFP Process & Timeline

The RFP will be issued during week commencing 19th June 2023 with responses submitted to Holly Harridence at hharridence@freedomfund.org copying Hannah de Ville at hdeville@freedomfund.org and Michel Agbodjinou at magbodjinou@freedomfund.org by 14th July 2023.

As part of the RFP process, a demonstration of the solution may be arranged which will form part of the evaluation.
RFP Confidentiality

This RFP and associated documents are the property of Freedom Fund and confidential. Apart from using the RFP to respond to it, you shall not disclose any details, to any other person or organisation, and shall treat this RFP and your response with complete confidentiality.

RFP Terms & Conditions

This RFP is a request for proposal relating to the GMS development, implementation and related services. It is not a contract, and no contractual obligations shall arise.

Freedom Fund will not be liable for any costs incurred in the preparation and submission of your response to this RFP.

RFP responses should be valid for a minimum of 6 months after the submission deadline date.

RFP responses will become the property of Freedom Fund and will not be returned.

Freedom Fund may at its sole discretion accept or reject an RFP response, cancel or revise part or all of the RFP, and request revised responses.

Freedom Fund is not committed to any course of action from this RFP or from the receipt of an RFP response.

This RFP comprises of the following information and should be considered in total:

- This RFP Document
- The Requirements Document - available upon request
- The Process Maps - available upon request
RFP Response

Please provide your response to this RFP, the information requested, and all the requirements listed in one document in either Microsoft Word or PDF format.

Late responses will not be accepted.

Confidentiality
All information contained in this RFP and any further information supplied by the FF during any subsequent correspondence, discussion or negotiations shall be deemed confidential information, unless that information is already publicly known.

Suppliers must obtain the written consent of the FF before disclosing to third parties or any Supplier group company any information relating to this RFP.