

Crohn's & Colitis UK
Invitation to tender for a Grants Management System
July 2024

1. About Crohn's & Colitis UK	3
2. Scope of Work	3
3. Tender submission	5
4. Selection Criteria	6
5. Key dates	6
6. Instructions for return of tender	7

1. About Crohn's & Colitis UK

We are the leading charity for Crohn's and Colitis. Over 500,000 people are living with Inflammatory Bowel Disease (IBD) of which Crohn's and Colitis are the two main types. They are lifelong diseases that many people have never heard of. Due to the stigma and misunderstanding surrounding these diseases, thousands of people are suffering in silence.

We are working to improve diagnosis and treatment, and to fund research into a cure; to raise awareness and to give people hope, comfort and confidence to live freer, fuller lives. We are here for everyone affected by Crohn's and Colitis.

For more information please visit our website www.crohnsandcolitis.org.uk

We have existed as a charity for over 40 years and are moving into a new phase with a new research strategy. A key element of our research strategy is to directly fund research for the benefit of patients. This tender is to ensure we have an efficient grants management system for all our grant-related activities.

2. Scope of Work

Background

Crohn's & Colitis UK have awarded research grants since 1979, funding over £11.5m of research. We fund medical research, and research to improve the lives of people with Crohn's and Colitis. We use a robust and impartial process accredited by the [Association of Medical Research Charities \(AMRC\)](#) to review applications and award grants.

Key grants information:

- There are currently **25 active awards** in our grants portfolio
- We open one guaranteed grant funding call annually, with a **budget of around £500K**. Subject to us securing additional funds, we may open another funding call (e.g. we received a further £250K for an additional targeted call in 2022).
- The **value of each award we fund is between £100-£150K**. Our preferred strategy is to fund smaller seed-funding type awards, which can generate the initial pilot data required to leverage larger project grants from other funding sources. We also aim to fund projects that require the initial investment to attract 'match-funding' from other organisations.
- On average, we **receive 10-15 applications per grant round** and fund around 5-7 applications (depending on their size).

Project Outline

We are seeking to implement a new system capable of storing information and managing all processes related to the entire grants lifecycle in one place. Our intention is for the grants management system to provide us with an efficient and time-saving way of

managing our grants (both for pre-and post-award activities), in contrast to our current system of using Excel spreadsheets and Word documents.

Key requirements:

1. Grants, contact and organisation records

- Store information about applicants and grant proposals that is linked to other awards/contacts
- Track the proposal's status as it moves through the grants cycle
- Capture and analyse demographic data for equity, diversity and inclusion (EDI) measurements

2. Grant applications

- Ability for grant managers to tailor and edit online application forms
- Allow multi-stage application and triage processes (e.g. shortlisting of outline applications and invitation to full proposal stage)
- Simple process of multiple applicants to work on one proposal before submission, using e-signatures
- Ability for applicants to upload all required documents, letters of support etc.
- Eligibility checks for new applicants
- Application outcome management - emails to successful and unsuccessful applicants
- Management of award letters and the contracting process for successful applicants

3. Application review

- Enable reviewers (review Panel members or external peer-reviewers) to access and score applications online. This ability to be possible from mobile devices.
- Flagging of potential conflicts of interest (e.g. institutional or geographical)
- Allow only abstracts to be viewed at reviewer invitation stage
- Ability for grant administrators to input scores directly from a Review Panel meeting for application ranking and funding decision-making

4. Grant reporting and financial management

- Track and monitor progress reports with automated alerts or display on a dashboard
- Track and monitor grants budgets and claims invoice payments (linking to progress report requirements and the finance system used by Crohn's & Colitis, if possible)
- Capture and measure grant outcomes to quantify impact and help make strategic decisions
- Ability to create reports and export data (e.g. in Excel format for easy analysis)

5. Data access and protection

- Different levels of access for different users to protect critical data
- Built-in virus scan or security feature of files that are uploaded to the system
- Audit logs - a record of who made updates
- Ability to export all grant data and all attached files on request

6. User experience, support and training

- Fields and functions should be intuitively named and easy to navigate

- Grant administrators should be able to perform common tasks quickly and efficiently
- A dashboard with summaries and updates of key grants figures and alerts should be provided
- Customer support should be easy to request, prompt and reliable
- Training should be available for new users, with training materials provided for reference

System costings:

We expect the costings of the grants management system to be based on the grants information provided above. There will be three staff members from the charity's Research Team that will be regular users of the system. In addition, there may be other staff from across the organisation who will require a read-only access to view information regarding particular grants (e.g. from our Philanthropy and Partnerships team to update donors on grant progress).

Bids should include the following:

- The initial set up and configuration fee
- The annual fee
- Migration of existing data (from Excel spreadsheets, Word documents) in to the system
- Introductory training for staff
- Tech support

3. Tender submission

Your tender submission should include the following:

- Your organisation name, address, registered address (if different) and website address
- The primary person's contact details
- The functionalities of your grants management system and how they meet our key requirements
- The cost of implementing your system, and the time-scale this can be done in
- Training and tech support you are able to provide
- Demonstration sessions that could be available for staff during the selection process
- Two current clients (preferably medical research charities) that we can contact for reference purposes

4. Selection Criteria

Responses will be evaluated by the charity using the following criteria (in no particular order):

- Ability to deliver on all key requirements
- Value for money on costs
- The time-scale for implementation
- Level of training and tech support available
- Ability to provide an interactive demonstration session
- Evidence of satisfactory clients (from a comparable organisation to Crohn's & Colitis UK)

5. Key dates

Date	Task
17 th July 2024	Invitation to tender launched
9 a.m. on 5 th August 2024	Deadline for tender submission
Week beginning 12 th August 2024	Interviews/demo sessions of shortlisted bidders
Week beginning 26 th August 2024	Award of tender
September 2024	Implementation of system commences

6. Instructions for return of tender

Crohn's & Colitis UK Contact Person

Please send an electronic version of your proposal, plus any appendices, to Yarunnessa Khan at research@crohnsandcolitis.org.uk by 5th August 2024, at 9:00am.

Confidentiality

The contents of this document and any accompanying documents contained herein is the property of Crohn's & Colitis UK unless otherwise stated and may not be disclosed in part or in full to any third party without the prior consent of Crohn's & Colitis UK. This also extends to all documents that might be supplied in connection with the tender or its implementation now or in the future.

All information obtained by Crohn's & Colitis UK from the bidders in connection with this tender will be treated in confidence. Any documents supplied by Crohn's & Colitis UK remain the property of Crohn's & Colitis UK, and their return may be requested.

Copyright Statement

This document and any correspondence documents are copyright and will remain the property of the charity and must be returned on demand if so requested.

The information contained herein is the property of Crohn's & Colitis UK and may not be copied, used or disclosed in whole or in part except with the prior written permission of Crohn's & Colitis UK.

Bid conditions

We reserve the right to disqualify any bidder from the selection process at any stage. In particular, the following events may lead to disqualification:

- any proposal received after the specified deadline
- any proposal that fails to conform in procedure, format, sequence substance of the requirements presented in this document
- failure to substantiate claims made in the response to this tender
- any breach of confidentiality.

Costs of response

Crohn's & Colitis UK will not be responsible for any costs incurred by bidders prior to signature of any formal Agreement, including those incurred in responding to this invitation and negotiating any Agreement. All activities which bidders carry out to properly demonstrate the viability of their proposals including demonstrations and presentations will be at their own cost. In turn, we will be responsible for our own expenses and costs throughout the tender and negotiating period.

Right of non-selection

Although it is currently intended that the procurement will take place in accordance with the provisions of this document, we reserve the right to terminate, amend or vary the procurement procedure by notice in writing at any point up to the signing of the Agreement. In the event of such termination, amendment or variation or otherwise, we shall not have any liability for any costs, expenses or other resources incurred by yourselves in participating in this procurement as a result of such termination, amendment or variation.

We do not bind ourselves to accept the lowest or any tender. The procedures described in this document are for guidance only.