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**CRM, programmes and grant management system**

**Request for Proposal**

**August 2025**

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# Introduction

* + This document is a Request for Proposal (RFP) for the supply of software and implementation support for a new CRM, programmes and grant management system for Access – the Foundation for Social Investment (‘Access’). The RFP should be read in conjunction with the separate ‘Scoping and requirements document’ and the spreadsheet of indicative costs included in Appendix A.
	+ All information contained in the RFP is confidential to Access. Likewise, all information included in your responses will be treated in confidence. You must undertake not to make any reference to Access in any literature, brochures or sales presentations without Access’s express written consent.
	+ Suppliers should understand that Access will not be responsible for any costs incurred in the preparation of their responses to this RFP. The preparation of responses shall be made without obligation on Access to acquire any of the items included in any response.
	+ You are asked to provide the information about your company as described in this RFP. You may include any general sales or technical literature relating to your company and products.
	+ If you have any questions about the RFP you should contact Yusra Ali at Access using the following contact details: Email: yusra.ali@access-si.org.uk. Access is able to offer informational calls and demo opportunities to potential suppliers. Please email to request this if it is of interest.
	+ Responses to the RFP should be sent in **word and pdf format to info@access-si.org.uk.**

***Responses must be received by no later than 9am on the 29th September 2025***

# Supplier response

This section describes the information and format that suppliers are requested to follow when responding to this RFP. You should follow the structure and format laid out below when compiling your response.

2.1 Management summary - suppliers are asked to provide a summary of:

* The proposed solution
* The benefits of your solution to Access, including:
	+ Any functionality that Access might benefit from that is not mentioned in the requirements document
	+ How the solution and relationship with your company would add value beyond implementation of the core application

2.2 Implementation - suppliers are asked to provide a summary of their proposed approach to implementation including:

* Overall approach
* Approach to managing the project, particularly in respect of Access/supplier responsibilities
* Approach to business analysis and solution design
* Details of key individuals involved in delivering, their CVs and respective day rates
* Approach to data migration
* Approach to training
* Estimated timescales
* Details of any constraints, risks and dependencies.

2.3 Requirements response - suppliers are asked to provide a summary of how they would meet each of the requirements as detailed in section 6 of the ‘CRM, programmes and grant management - Scoping and requirements document’, namely:

* Organisation and individual contact management
* Account management
* Engagement stage management
* Programmes and grants management and administration
* Events and conferences management
* Advocacy and communications
* Integration with office productivity tools
* Integration with digital marketing tools
* Reporting and analytics

2.4 Contracts and costs - suppliers are asked to:

* Provide a copy of your standard contracts for the software licensing, implementation, and support and maintenance
* Describe your proposed licensing model
* Complete the schedule of indicative costs, attached as Appendix A
* Describe your approach to on-going support and development of the system
* Indicate if there are different levels of provision available at different cost levels
* Detail the day rates for each individual who will be involved in implementation, support and maintenance (as referenced above)

2.5 Supplier information - suppliers are asked to provide the following general information regarding their company and staffing, in particular:

* How long the company has been in existence in its current form
* The scope of the company’s activities
* Approximate company turnover for each of the past three years
* Information about your proposed future product roadmap
* The total number of staff employed by the company, a) in the UK, and b) globally (if applicable)
* Your protocols and approach to complying with data protection regulations and information security

2.6 Details of customers and reference sites – suppliers are asked to provide details of:

* The number of your customers who are currently using software of a similar nature to that proposed for Access, in total worldwide and in the UK specifically
* At least three potential reference sites which are using the proposed solution that Access can contact (reference sites will not be contacted until the supplier has made the appropriate introduction)
* Any other reference material you consider relevant.

# Shortlisting and Demo Process and Timeline

* Applicants will be evaluated based on the criteria below, with the scoping requirements following those laid out in the Requirements Document. Responses to the criteria will be scored based on the process outlined in Appendix B. Please ensure you read this.
* The timeline below outlines the steps in the shortlisting and procurement process.

|  |  |
| --- | --- |
| **Process** | **Planned Dates** |
| RFP launched | 28th August |
| Informal demos and informational calls offered | 28th August – 25th September |
| **Submission deadline** | 29th September |
| Evaluation period | 30th September –13th October |
| Shortlisted suppliers invited to interview and demo | 14th October |
| **Interview dates** | 20th Oct – 23rd Oct  |
| All shortlisted suppliers informed of result at the latest | 21st November |
| Standstill period  | 24th November-3rd December |
| Contracting | December |
| Implementation begins | January 2026 |

The shortlisting Criteria are:

|  |  |  |
| --- | --- | --- |
| **Supplier background & delivery** | **Weight** | **What we are looking for** |
| Supplier credentials  | 10% | * Years company has been trading
* Credentials of the team
* Commitment to ongoing product development and innovation
 |
| Supplier track record in delivering comparable projects  | 15% | * References
* Staff expertise with similar work
* Experience with Foundations/Social Investment Sector
 |
| Implementation approach | 10% | * Clarity and feasibility of implementation plan
* Training options and materials Post-launch support structure (response times, escalation process)
 |
| **Solution** |
| Ease of use/User experience | 10% | * Intuitive interface for staff with varying tech skills
* Mobile access and accessibility compliance
* Easy to train on
 |
| Functional Fit – Scoping requirements | 30% | * Organisation and individual contact management
* Account management
* Engagement stage management
* Programmes and grants management and administration
* Events and conferences management
* Advocacy and communications
* Integration with office productivity tools
* Integration with digital marketing tools
* Reporting and analytics – general capabilities
* Reporting and capabilities – social investor data update
 |
| **Commercials** |
| Estimated price  | 20% | * Value for money
* Transparent pricing for licensing, implementation, customisation, and ongoing costs No hidden or surprise fees
 |
| Level of financial risk | 5% | * Risks related to the commercial proposition
* Risks related to the financial standing of the company
 |

# Appendix A: Schedule of indicative costs



# Appendix B: Scoring Matrix Criteria 1-5.

| **Score** | **Comment** | **Detail** |
| --- | --- | --- |
| 1 | Poor | No response or partial response and inadequate evidence provided in support of it. Does not give Access confidence in the bidder’s capability to deliver the contract.  |
| 2 | Weak | Response is supported by a limited / narrow statement of evidence in several areas giving rise to concern for Access about the bidder’s capability to deliver the contract.  |
| 3 | Satisfactory | Response is supported by a sufficient statement of evidence and proposes credible actions in at least one area. In a few instances is lacking sufficient detail giving rise to some concerns about the capability to deliver the contract.  |
| 4 | Good | Response is comprehensive and supported by a sufficient standard of evidence. Gives Access a high level of confidence in the ability of the bidder to deliver the contract.  |
| 5 | Excellent | Response is very comprehensive and supported by a sufficient standard of evidence. Gives Access full confidence the ability of the bidder to deliver the contract.  |