

CALL FOR EXPRESSION OF INTEREST

Online Grant Management System



PROJECT	NACOSA Online Grant Management System		
REFERENCE	CFI-NACOSA-01-2024	DATE	29 October 2024
SUMMARY	<p>As part of the grant management function NACOSA is investigating the use of an online grant management system to manage full grant cycles from application to close-out phase. An online grant management system will enhance NACOSA’s efficiency in managing grants implemented across various health-related sectors and geographic areas in South Africa including aspects such as sub-awardee appointments, tracking grant compliance, and reporting to donors.</p> <p>This terms of reference (ToR) serves as a call for expressions of interest to gather information and identify online grant management solutions available in the market. This is not a request for proposals or tenders.</p>		
QUESTIONS	<p>Questions can be addressed by email only to Queries@nacosa.org.za with the reference in the subject line.</p> <p>Questions may be submitted on or before 11 November 2024.</p>		
BRIEFING	There will be no briefing session at this stage		
DEADLINE	All expressions to be submitted to proposals@nacosa.org.za no later than 13:00 on 18 November 2024 .		
DOCUMENTS	1. Annex 1: Expression of Interest Form		

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1. INTRODUCTION

Born out of a movement to draft the first national strategic plan for AIDS, the Networking HIV and AIDS Community of Southern Africa (NACOSA) has played an important role in mobilising an effective, multi-sectoral response to HIV, AIDS and TB – South Africa's main public health challenges. NACOSA is now a leading networking organisation and grant manager, that partners with communities for better health in Southern Africa. We do this through:

- Facilitating **networking** and collaboration
- Providing and enabling access to **services**
- **Strengthening** community systems
- Mobilising and managing **resources** sustainably
- **Advocating**, learning and sharing collectively

NACOSA focuses on HIV, AIDS, TB and other public health issues like GBV, sexual and reproductive health and pandemics. The organisation works at all levels – from international agencies, the corporate sector, research institutions and government, to local services and small, community groups.

As part of our grant management function, NACOSA is investigating the use of an online grant management system to manage full grant cycles from application to close-out phase. An online grant management system will enhance NACOSA's efficiency in managing grants implemented across various health-related sectors and geographic areas in South Africa including aspects such as implementing partner appointments, contract management, tracking grant compliance, and reporting.

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2. PROJECT OVERVIEW

The features and functionalities required from a grant management system for NACOSA to manage the full grant life cycle from application to close-out is envisaged to include:

2.1 Stakeholder Engagement and Document Management Requirements

2.1.1 Funding Application Management Capability

- Terms of Reference or Requests for applications (RFAs) as published by NACOSA
- Customisable online application forms with window periods and close-off times.
- Online submission including application and required documentation, tracking, and reviewing of grant applications.
- Selection Committee records including appointment letters, conflict of interest (COI) forms, scoring matrixes, minutes, appeals documents and final recommendations to be ratified by the NACOSA Internal Procurement Committee
- Correspondence to successful and unsuccessful applicants
- "Applicant support features (e.g., FAQs, briefing meetings, help desk, application progress tracking)"

2.2 Contractual and Due Diligence Records Platform

- Contracted implementing partners should be able to access this platform of the system.
- Contract templates
- Database of implementing partner information
- Facility to send reminders to partners
- Capacity Assessment tool (CAT) reports
- Capacity Building Plans
- Contracts with addendums and amendments and profiles of implementing partners (this documentation will also be available on NetSuite as part of procurement information – a plugin may be efficient). As some partners may be contracted over several grant cycles the documentation should be separable according to grant cycle periods.
- Organisational policy and procedure documents of partners as may be required by NACOSA over time i.e. Human Resource Management, Finance, Fleet and Asset Management Policies
- Performance Frameworks
- Budgets and budget amendment approvals
- Management letters
- Other correspondence e.g. Assets management, insurance of assets, letters confirming banking details, HR tracker (changes to board composition, vacancy tracker)
- Quality Assurance reports: Routine or ad hoc quality assessment reports compiled by NACOSA staff i.e. Site visit reports by M&E or programme staff, Site Improvement Monitoring Systems (SIMS) outcomes reports.
- Version control and audit trail for all documents

2.3 Compliance documentation Tracking and Reporting Capability

- Submission of monthly programme performance and finance reports with window periods
- Registers and other tools used for monitoring and tracking adherence to grant conditions and regulations i.e.
- Financial Management and HR Tracking - The system should provide tools for managing grant budgets, tracking expenditures, and reconciling accounts (we have budget and monthly reporting templates). It should also integrate with NACOSA's ERP System. This change broadens the scope to include more comprehensive financial management tools.
- Notification of key personnel changes
- Special conditions tracker
- Annual SAMS registrations
- Annual Financial Statements (AFS)
- Non-profit Organisation (NPO) updates

2.4 Grant Information for Implementing Partners Page/platform

- Dashboards on programme performance and spending
- Interactive data visualization tools enabling implementing partners to better understand their performance data,
- Meeting information
- **Management of event logistics:** Invites, Attendance confirmations, meal preferences, etc.
- **Quarterly reports and handouts:** Attendance registers, Minutes and supporting documentation of routine meetings with implementing partners

- Programme Descriptions and Implementation Plans
- Policies and guiding frameworks of the donor e.g. Child protection policy, PSEAH policy, Whistle-blowing policy, Code of conduct for suppliers and recipients
- Standard Operating Procedures (SOPS)
- Recordings of webinars
- Automated compliance checks and alerts as stated below

2.3 Donor Engagement Page/Platform

- NACOSA's donor-related documentation may form part of its broader document management system but we may want to consider the online grant management system's functionality to serve as a platform for managing its own donor requirements which may include:
 - Contracts and amendments over a grant cycle period
 - Disbursement notifications from donors and receipts to donors with potential plugin to NetSuite
 - Programme Descriptions and Implementation Plans
 - Reminder notifications to programme staff
 - NACOSA Reports to donors
 - Important correspondence
 - Customisable donor reporting templates

Other requirements

- **Setup:** A customisable setup that would allow NACOSA to add or remove features as required to keeping the system optimal.
- **User Access Controls:** Different levels of access for staff, reviewers, and grantees. Compliance to POPIA requirements
- **Communication Tools:**
 - Automate email notification, reminders, action requests or initiation of specific workflows.
 - Integrated messaging and notification systems linkable to email notification would be ideal to keep a record of all communications to implementing partners, either single or group communications.
 - Polls/Surveys
- **API Integration Capabilities:** Compatibility with existing systems like NetSuite, CRM, Training Institute MIS, Power BI, SharePoint. NACOSA internal operating systems are Microsoft 365 and Oracle NetSuite.
- **Accessible on all types of devices**

3. REQUIREMENTS

Call for expression of interests are required to complete **Annex 1: Expression of Interest Form** and provide the following:

	ITEM	<input checked="" type="checkbox"/>
1.	Company Profile including experience in the field of online grant management systems	
2.	Description of online grant management platform on offer including capabilities and advanced applications aligned to and/or exceeding the Project Description	
3.	Cost related information – Respondents do not have to submit a quote but rather provide information on its costing model and elements such as hardware, network infrastructure, or additional staff that the organisation has to consider in budgeting for an online grant management system	
4.	Completed and Signed Declaration of Interest (included in Annex 1)	
5.	Signed Call for Expression of interest (Page 6- Declaration)	

4. TIMEFRAMES

Please be advised the dates below are indicative and subject to change.

ACTION	DATE
Deadline for potential Call for expression of interests to submit questions	11 November 2024
Deadline for responses to all interested Call for expression of interests	13 November 2024
Deadline for submission of proposals	18 November 2024

5. TERMS AND CONDITIONS

Invitation not an offer

This serves as an invitation to facilitate a requirement-based decision and not an offer to do business with NACOSA. Call for expression of interests making enquiries on the call for expression of interest may notify NACOSA by email only at the email address provided for communication.

Language

The submission prepared by the Call for expression of interest including correspondences and documents relating to this call for expression of interest shall be written in the English language.

Preparation Costs

The Call for expression of interest shall responsible for all its costs incurred in preparing, submitting and presenting any response to this call for expression of interest and all other costs incurred by it throughout the call for expression of interest process.

Due Diligence

NACOSA reserves the right to conduct due diligence on the prospective Call for expression of interest which may include requests for additional information and presentations.

Discretion

NACOSA reserves the right to accept or reject any call for expression of interest and to cancel the call for expression of interest process and reject all call for expression of interests at any time, whether before or after the closing date of this call for expression of interest without attracting any liability.

Information Validity

NACOSA has made reasonable efforts to ensure accuracy in compiling the terms of reference for this project. The Call for expression of interest is deemed to have examined the terms of reference and any other information supplied by NACOSA to the Call for expression of interest and have satisfied itself as to the correctness and sufficiency of such before submitting its proposal. Also, neither NACOSA nor its employees or agents will be held liable to the Call for expression of interest or any third party for any inaccuracy or omission in this call for expression of interest.