

Mertz Gilmore Foundation
218 East 18th Street
New York, NY 10003

Request for Proposal: SmartSimple GMS360 Implementation and Refinement Consultant

Background

The Mertz Gilmore Foundation is a private, independent grantmaking institution that supports and promotes vibrant communities, the performing arts, a sustainable environment and a people-centered democracy. We are a small staff of nine with the Grants/Systems Manager and the Program Associate currently serving as the GMS 360 System Administrators.

The Foundation transitioned from the GIFTS Alta grants management system to SmartSimple GMS 360 in January 2019. Prior to that, the Foundation used a paper application process (conducted via email). We translated our paper application form to the GMS 360 platform and have completed three grants cycles using the new digital application system. We have also collected grant reports, run reports for record-keeping and budget purposes, and made a number of refinements on the platform to-date.

Over the past year, the System Administrators have learned a lot about the GMS 360 Platform and its potential for enhancing the Foundation's grantmaking processes. As we continue to use the system and refine our grants process, our needs go beyond our in-house capacity.

Scope of Work

Staff have limited hard technical skills (i.e. coding, system security considerations, etc.) and little experience working with online application portals. We are looking for a consultant who can help us optimize our application process and make the needed technical changes to improve both internal and external user experience. We seek a consultant to conduct a wide range of refinement projects independently and also to help us build our staff knowledge and skills. Our priorities include:

- Building and refining user portals for better user experience and storage of information;
- Creating multiple application forms within a program area and refining the application process for each program;
- Improving the registration process (i.e., to better allow multiple users within the same organization to register, work on, and access all records, while maintaining the integrity of the data);
- Cleaning of imported data;
- Editing workflows and establishing customized email accounts on the system (i.e., messages sent via each staff member's email address);
- Creating an export option for MS Word, specifically to generate grant letters and grant agreement forms;
- Building more robust reporting functionality and list views; and
- Training staff members both one-on-one and in workshop sessions.

This is an independent contractor role. Our goal is to have a consulting contract in place during the first quarter of 2020. We intend to engage the consultant over the current year and likely beyond. We anticipate that our needs are time-intensive at the start of this project, with the consultant later providing support on an as-needed basis.

Requirements

The consultant must have significant prior experience working with the SmartSimple GMS 360 platform. Experience helping clients streamline application processes is required. Experience working with clients transitioning from a paper application to an online process a plus.

We strongly prefer a consultant who is based in the New York metropolitan area and has worked with small grantmaking foundations before (staff of 15 or less).

The consultant must be willing to travel to the Foundation occasionally for onsite support with the System Administrators and the full staff.

Submissions

Please submit a letter that responds to the above scope of work, discussing your qualifications and relevant experience, a summary of services you can provide, your available start date, and a proposed fee structure or hourly rate. (We anticipate negotiating a contract based on a shared understanding of the time commitment required to implement the scope of work.) Submissions should also include a resumé and client list.

Please submit all materials by February 21, 2020. All submissions and questions should be directed via email to Mary Piccione, Grants/Systems Manager (MPiccione@mertzgilmore.org), with **RFP SmartSimple in the subject line**. We will acknowledge every submission.