

Request For Proposal (RFP) - Grant Making System and CRM

1. Introduction

The Tudor Trust invites proposals from experienced solution providers to design, implement, and support a new **Grant Making System and CRM**.

We have redesigned our grant-making approach with a new framework that is relationship-based, trust-led and emergent. Informed by our strategy 'The Change We Seek', we are committed to building long-term partnerships that strengthen civic power through the lens of racial justice. We are working towards a total-asset approach to advance these aims, aligning all our resources to support, deep and sustainable change.

We are now seeking a new grant making system that is better aligned with our ways of working and supports practices in line with our Change We Seek strategy.

This new system will underpin our transition to a **data-informed, learning-centred, and ethically managed grant making environment**, supporting our organisational values of relationship-based, trust-led grant-making viewed through a racial-justice lens.

The implementation partner will work collaboratively with the Tudor Trust to co-design, build, configure, and deliver a system that:

- Supports our grant making processes end-to-end
- Integrates smoothly with supporting tools (e.g. email, document management, and the Trust's accounts and banking systems where required)
- Is secure, accessible, extensible and future proof
- Minimises disruption during the migration from the current system.

The expected go-live is no later than **August 2026**.

2. About The Tudor Trust

The Tudor Trust is an endowed charitable trust, committed to deploying its capital in ways that centre racial justice as a core focus through which to address the intersections of all injustice. This commitment guides our grant-making.

Strategically, and in line with our Change We Seek strategy, we take a systems thinking approach to envision a world that is more just and equitable.

3. Objectives

The primary objectives of this project are to:

1. **Implement** a secure, flexible, and user-friendly Grant Making System and CRM.
 2. **Streamline workflows** for grants administration and reporting.
 3. Allow the **capture and use of non-binary qualia** in service of the new grant making process.
 4. **Enable better data insight** for learning and decision-making.
 5. Provide a system that **allows the individual to be the fundamental component of the CRM** rather than the organisation. People move over time and that should be part of the individual history. Organisations are collections of individuals with a shared vision.
 6. **Allows for better visualisation** of the relationships formed within our ecosystem.
 7. **Integrates** key data flows between the Grant Making System and CRM and the Trust's accounts and banking systems. This requirement will evolve over time, but the initial integration will be minimal.
 8. **Improve accessibility and collaboration**, ensuring effective use across the team (both in-office and remote).
 9. **Embed privacy, data ethics, and accountability** into the design and governance of the new system.
 10. **Establishes a learning infrastructure** that treats data as a shared resource for collective benefit rather than institutional control, ensuring our technology choices reinforce rather than undermine our commitment to shifting power to communities.
-

4. Scope of Work

The successful supplier will deliver:

4.1 Discovery & Design

- Review existing processes, workflows, and data structures within the current systems.
- Facilitate workshops with Tudor Trust staff to map key grant-making journeys.
- Propose a system architecture and configuration plan aligned with our values, objectives and needs.
- Produce a validated design specification prior to build.

4.2 System Build & Configuration

- Configure the Grant Making System and CRM to support the Tudor Trust's grant lifecycle, including:
 - Future partner intake and strength-based assessment
 - Decision recording. Layering observations to achieve progressive due diligence
 - Grant payment scheduling and tracking
 - Learning and reporting
- Implement integrations with:
 - **Microsoft 365** (email, document storage)
 - **SharePoint** for document management and versioning
 - **Miro boards** for capturing brainstorming and conceptualisation
 - **The Trust's accounts and banking systems** for import/export of financial transactions (e.g. grant payments and reconciliations) This is a fluid requirement as the financial systems are also under review. The ability to import and export transaction data is the baseline requirement.
 - **Dragon** dictation software
- Ensure compliance with **UK GDPR** and strong information-governance practices.
- Develop the new solution in an agile environment allowing for staff input to be quickly included to the product and deployed. Have an automated deployment process using a CI/CD pipeline
- Provide role-based access controls, audit trails, and secure authentication.

4.3 Data Migration

- We will only be migrating the data that is in line with our Change We Seek grant process into the new system, but we will need to retain search access to the remainder of the data. We are happy to hear proposals on how this could be implemented.
- Clean, validate, and map relevant data into the new Grant Making System and CRM schema.
- Support test migrations and final production migration.
- Deliver a data-migration plan with clear validation checkpoints.

4.4 Testing, Training & Rollout

- Develop a comprehensive test plan including UAT (User Acceptance Testing).
- Deliver training sessions and documentation for staff.
- Support phased rollout and post-launch review.

4.5 Ongoing Support & Maintenance

- Provide ongoing technical support, maintenance, and updates.
- Offer options for hosting (cloud or hybrid cloud as appropriate).
- Include service-level agreements (SLAs) for uptime, response times, and resolution.

4.6 Define and capture learning indicators including:

- Qualitative outcome narratives at grant and portfolio level
 - Relationship depth metrics (frequency and quality of interactions)
 - Power-shifting indicators (e.g. partner-led decision points)
 - Capturing grant-making and other forms of resourcing
 - Emergent theme recognition across grants
 - Success measures defined by partners, not just the Trust. The system should support flexible taxonomies that can evolve based on learning and insights.
-

5. System Requirements Overview

The detailed **Functional Requirements Matrix (Appendix A)** and **Technical Requirements Matrix (Appendix B)** define the required capabilities.

At a high level, the Grant Making System and CRM should support:

- Full lifecycle grant management based on our emergent process
 - Secure user roles and permissions
 - Flexible reporting and dashboarding
 - Integration with email and document-management systems (Office 365, SharePoint, Outlook)
 - Data exchange with the Trust's accounts and banking systems
 - API or connector framework for current and future integrations
 - Accessibility and inclusive design
 - Budget overview that updates in real time
 - Audit and compliance logging
-

6. Current System Overview

A detailed summary is provided in **Appendix C**. In brief:

- The current BBGM system is used for grant tracking, reporting, and payment scheduling.
- Payments are set up and exported from BBGM via an Excel macro which generates a .csv file to allow upload to the bank and an import file which automatically updates and marks relevant records as paid once payments have been authorised. Financial reconciliations are also based on reports exported from BBGM. The accounts system is manually updated as we currently have no link from BBGM to Sage 50.

- The new Grant Making System and CRM should streamline and automate this exchange where possible, using safe import/export workflows or ODBC data connections.

7. Key Deliverables

Phase	Deliverable	Description
1	Discovery Report	Documented findings, system design, and proposed configuration
2	System Prototype	Once MVP is achieved
3	Data Migration Plan	Strategy, mappings, and test migration
4	Training & Documentation	Staff guides, manuals, and admin reference materials
5	Final System & Go-live	Deployed production system and support plan

8. Supplier Qualifications

Suppliers should demonstrate:

- Experience delivering Grant Making System and CRM solutions for charities or foundations.
- Proven success implementing systems that support good governance/due diligence processes and enable users to easily see/understand key decision-making touchpoints.
- Expertise in data migration and change management.
- Understanding of ethical data practices and user-centred design.
- Commitment to collaborative, iterative delivery.

9. Proposal Submission

9.1 Response Format

Suppliers should follow the format of the **Supplier Response Template (Appendix E)**, providing concise, evidence-based responses. Additional documentation may be included as appendices.

9.2 Evaluation Criteria

Proposals will be assessed based on:

Criterion	Weighting
Technical fit and functionality	25%
Implementation approach and team experience	25%
Cost and value for money	15%
Understanding of Tudor Trust values and approach	25%
Support, training, and long-term sustainability	10%

Understanding of Tudor Trust values and approach (25%):

Suppliers must demonstrate through specific examples:

- Previous work with social and racial justice or community-led organisations
- How they've adapted systems to support non-extractive data practices
- Experience balancing compliance needs with trust-based approaches
- Commitment to inclusive design beyond minimum accessibility standards
- Their organisation's own diversity, equity and inclusion practices
- Approach to power dynamics in supplier-client relationships
- Demonstrate an understanding of how the racial justice lens can manifest within the technology implementation

Please provide 2-3 case studies with named references where possible.

9.3 Submission Details

Full submission details and deadlines are provided in **Appendix D – Key Dates and Milestones**.

Submissions should be sent electronically to: crmproject@tudortrust.org.uk

10. Project Governance

The project will be led by a cross-functional team at The Tudor Trust. Regular steering-group meetings will guide decision-making and ensure alignment with organisational strategy.

The successful supplier will report to the **CRM Project Lead** and collaborate with the Database Working Group team throughout all phases.

11. Terms and Conditions

- All project deliverables and intellectual property developed for The Tudor Trust will become its property upon completion and payment.
 - The supplier must comply with all relevant UK data-protection, information-security, and accessibility legislation.
 - The Trust reserves the right to amend, withdraw, or reissue this RFP at any time.
-

12. Appendices

- **Appendix A – Functional Requirements Matrix**
 - **Appendix B – Technical Requirements Matrix**
 - **Appendix C – Current System Overview**
 - **Appendix D – Key Dates and Milestones**
 - **Appendix E – Supplier Response Template**
 - **RFP Summary Sheet**
 - **Supplier FAQ – Tudor Trust RFP**
-

End of Request for Proposal

Appendix A – Functional Requirements Matrix

This appendix details the core functional requirements for the proposed Grant Making System and CRM.

Each requirement should be addressed in the supplier's response (see Appendix E – Supplier Response Template).

Suppliers should indicate whether functionality is available out-of-the-box, requires configuration, requires custom development, or is not achievable.

1. Core Grant Making Functions

Ref	Requirement	Priority	Notes
1.1	Manage the full grant lifecycle from initial engagement to closure.	High	End-to-end tracking including status updates and workflow transitions.

1.2	Support different grant types (e.g. one-off grants, multi-year funding, restricted funds, individuals).	High	Configurable templates and fields for each type.
1.3	Enable creation, review, and approval of grantees with role-based permissions.	High	Built-in approval workflows.
1.4	Track key dates (milestones, payment schedules, grant updates).	High	Calendar and notifications required.
1.5	Generate grant agreements and correspondence from templates.	Medium	Integration with Microsoft 365 and SharePoint for document generation and storage/versioning.
1.6	Record monitoring data against grants.	High	The programme team will need to be able to record grant updates in a variety of forms e.g. attendance at partner events, notes from check-in meetings, other ad hoc updates our grant partners send us etc.
1.7	Link grants to people and relevant organisations for relational insight.	High	Core CRM functionality.

2. CRM and Relationship Management

Ref	Requirement	Priority	Notes
2.1	Maintain records for individuals, organisations and funding partners.	High	Single source of truth with deduplication/merge functionality and the ability to maintain the record of an individual across time and organisations. This includes the provision for allowing an individual to be a member of more than one organisation at the same time.
2.2	Support custom relationship types (e.g. advisor, funder, partner).	High	Configurable relationship taxonomy.
2.3	Enable activity logging (calls, emails, meetings, events, chats, qualia) with searchable history.	High	Sync with Microsoft 365 where possible.
2.4	Provide tagging, segmentation, and	Medium	Filters and export to mailing tools.

	communication lists for stakeholders.		
2.5	Offer dashboards showing engagement and grant relationships by individual, organisation and/or region.	Medium	Visual summaries

3. Financial Tracking and Integration

Ref	Requirement	Priority	Notes
3.1	Record approved grant amounts, payment schedules, and balances.	High	Automated totals and outstanding amounts.
3.2	Support export/import of financial data to and from the Trust's accounts and banking systems.	High	API, CSV or ODBC data exchange.
3.3	Flag duplicate or inconsistent payment records for review.	Medium	Reliable data-validation rules.
3.4	Provide summary reports of committed, paid, and remaining funds.	High	Filter by programme or fiscal year.
3.5	Allow reconciliation of payments with bank transactions where applicable.	Medium	Manual check or imported statements.

4. Reporting and Learning

Ref	Requirement	Priority	Notes
4.1	Provide customisable reports and dashboards for grant and organisation data.	High	No-code report builder.
4.2	Enable export to CSV / Excel / PDF formats.	High	User-friendly data access.
4.3	Support qualitative and quantitative data capture for learning and evaluation.	High	Structured and free-text fields.
4.4	Provide visualisations (trends, maps, charts).	Medium	Embedded charting or integration with BI tools.
4.5	Enable scheduled and automated report delivery via email.	Low	Optional feature.
4.6	Capture qualitative outcome narratives at grant and portfolio level.	High	Support narrative reporting beyond metrics.
4.7	Track relationship depth metrics.	Medium	Frequency and quality of interactions.

4.8	Monitor power-shifting indicators.	High	Track grantee-led decision points.
4.9	Support emergent theme identification across grants.	Medium	Pattern recognition tools.
4.10	Allow grant partners to define their own success measures.	High	Beyond Trust-defined metrics.
4.11	Support flexible taxonomies that evolve with learning.	Medium	Adaptable classification systems.

5. User Experience and Accessibility

Ref	Requirement	Priority	Notes
5.1	Modern, responsive interface accessible on desktop and mobile.	High	WCAG 2.1 AA compliant at minimum.
5.2	Provide role-based dashboards and task lists.	High	Personalised views.
5.3	Support multi-factor authentication and SSO.	High	Integration with Microsoft Entra ID for SSO (preferred).
5.4	Allow customisable fields and layouts by administrators.	Medium	Drag-and-drop config.
5.5	Provide inline help and user guidance.	Low	Tooltips and links to documentation.

6. Data Management and Governance

Ref	Requirement	Priority	Notes
6.1	Provide robust search and filter capabilities across all records.	High	Advanced live search
6.2	Allow bulk data import/export with validation feedback.	High	CSV uploads with field mapping.
6.3	Maintain complete audit trail of changes.	High	Who/what/when for each record.
6.4	Support data-retention policies and deletion requests per UK GDPR.	High	Configurable retention rules.
6.5	Provide data-quality monitoring tools.	Medium	Alerts for missing or invalid fields.
6.6	Implement consent management for data sharing.	High	Grantee control over data use.
6.7	Enable community data sovereignty features.	High	Individuals and organisations own their narratives.
6.8	Provide transparency for any automated decision support.	Medium	Explainable algorithms.

6.9	Support enhanced 'right to be forgotten' implementation.	High	Beyond GDPR minimums.
6.10	Avoid extractive data collection practices.	High	Power-aware data gathering.
6.11	Enable reciprocal data sharing with funded organisations.	Medium	Two-way data exchange.
6.12	Support annual data ethics review process.	Medium	Include community input mechanisms.

7. Integration and Interoperability

Ref	Requirement	Priority	Notes
7.1	Integrate with Microsoft 365 for email and document management.	High	Outlook and SharePoint connectivity.
7.2	Provide secure API or webhooks for current and future third-party integrations.	High	REST / GraphQL preferred.
7.3	Allow import/export with the Trust's accounts and banking systems.	High	Financial data interchange.
7.4	Support integration with data-visualisation tools as required.	Medium	E.g., Power BI, Tableau other commercial and open-source alternatives.

8. Administration and Configuration

Ref	Requirement	Priority	Notes
8.1	Administrative console for user management and permissions.	High	Granular user and role control.
8.2	Audit log review and export.	High	Security and compliance monitoring.
8.3	Custom field and form builder.	Medium	Low-code configuration preferred.
8.4	Scheduled backups and data export tools.	High	Automated and on-demand options.

9. Training and Support

Ref	Requirement	Priority	Notes
9.1	Provide administrator and user training materials.	High	Manuals or videos.
9.2	Deliver train-the-trainer sessions (pre-launch).	Medium	Virtual or in-person.
9.3	Provide post-launch support and ticketing process.	High	Documented SLA.

9.4	Offer knowledge base and FAQ portal.	Low	Self-service resources.
-----	--------------------------------------	-----	-------------------------

End of Appendix A

Appendix B – Technical Requirements Checklist

This checklist sets out the core technical and non-functional requirements for the Grant Making System and CRM.

Suppliers should indicate compliance and provide explanatory notes where required.

1. System Architecture and Hosting

Ref	Requirement	Type	Priority	Notes
1.1	The system must be deployable in a secure, modern architecture (cloud, hybrid cloud).	Infrastructure	High	Specify recommended hosting model.
1.2	Data must be stored within the UK or EEA.	Data residency	High	Confirm hosting region.
1.3	The solution should be scalable to support future data growth.	Performance	Medium	Estimate current and projected load.
1.4	Support for containerised or virtualised deployment.	Architecture	Medium	Docker/Kubernetes optional as required.
1.5	Support regular, automated updates with minimal downtime.	Maintenance	High	Describe release/update strategy.
1.6	Provide modular design for feature flexibility.	Flexibility	High	Allow addition/removal without core impact.
1.7	Enable user-editable workflows.	Flexibility	High	Adjustable without vendor involvement.
1.8	Provide open API architecture.	Integration	High	Support future tool integration.
1.9	Implement version-controlled configuration management.	Change control	Medium	Track all configuration changes with version control
1.10	Provide sandbox environment for testing.	Testing	Medium	Test new approaches safely.
1.11	Support annual strategy alignment reviews.	Governance	Medium	Assess system fit with evolving strategy.
1.12	Documentation change procedures made clear for non-technical users.	Documentation	High	Enable self-service modifications and additions.

2. Security and Compliance

Ref	Requirement	Type	Priority	Notes
2.1	Comply with UK GDPR and Data Protection Act 2018.	Compliance	High	Provide compliance evidence.
2.2	Provide role-based access control (RBAC).	Security	High	Include hierarchy examples.
2.3	Support multi-factor authentication (MFA).	Security	High	State compatible methods.
2.4	Provide secure encryption of data in transit and at rest.	Security	High	Describe encryption standards.
2.5	Maintain comprehensive audit logs for all data changes.	Audit	High	Must include who/what/when.
2.6	Support integration with Microsoft Entra ID (formerly Azure AD).	Authentication	Medium	Specify if SSO is supported.
2.7	Enable fine-grained permission management for staff roles.	Security	High	
2.8	Maintain logs for a minimum of 12 months and allow export/archival	Compliance	Medium	

3. Data Management and Migration

Ref	Requirement	Type	Priority	Notes
3.1	Provide import/export tools with field mapping and validation.	Data handling	High	CSV and bulk operations.
3.2	Support migration of data from the current BBGM system.	Data migration	High	Describe process and tooling.
3.3	Allow partial/test migrations before final cut-over.	Migration	High	Include rollback options.
3.4	Provide data validation reports and error handling.	Data quality	High	
3.5	Allow data archival and retention per policy.	Compliance	Medium	

4. Integration and Interoperability

Ref	Requirement	Type	Priority	Notes
4.1	Integrate with Microsoft 365 for document management and email.	Integration	High	SharePoint/Outlook integration.
4.2	Allow import/export of financial data to and from the Trust's accounts and banking systems.	Integration	High	CSV, ODBC, or API-based exchange.
4.3	Provide an open, standards-based API (REST or GraphQL).	API	High	Include authentication model.
4.4	Support secure web-hooks for event-driven integrations.	API	Medium	Optional but desirable.
4.5	Support future integration with data-visualisation tools (e.g. Power BI, Tableau).	Interoperability	Medium	

5. Performance and Reliability

Ref	Requirement	Type	Priority	Notes
5.1	System uptime SLA of 99.5% or greater (excluding planned maintenance).	Availability	High	Define measurement method.
5.2	Average response time for user actions under 2 seconds.	Performance	Medium	Under typical load.
5.3	Scalable architecture to handle increased usage.	Scalability	Medium	
5.4	Real-time saving and autosave capabilities.	Usability	Medium	
5.5	Graceful handling of concurrency and lock conflicts.	Reliability	High	

6. Backup, Recovery, and Business Continuity

Ref	Requirement	Type	Priority	Notes
6.1	Provide a backup strategy and implementation with daily complete snapshots and 30-day retention	Backup	High	

6.2	Provide restore testing	Continuity	Medium	
6.3	Offer disaster recovery with RTO < 24 hours and RPO < 4 hours.	DR	Medium	Define recovery objectives.
6.4	Allow on-demand data export by administrators.	Control	High	
6.5	Provide full encryption for backups.	Security	High	

7. Accessibility and Usability

Ref	Requirement	Type	Priority	Notes
7.1	Comply with WCAG 2.1 AA accessibility standards.	Accessibility	High	Provide evidence or testing approach.
7.2	Provide mobile-friendly responsive design.	UI/UX	Medium	Optimised for tablets/laptops.
7.3	Allow configurable dashboards per user role.	Usability	High	
7.4	Offer inline help and tooltips.	UX	Low	Optional guidance.

8. Administration and Audit

Ref	Requirement	Type	Priority	Notes
8.1	Provide central admin console for user management.	Admin	High	
8.2	Record and display all login attempts.	Audit	High	
8.3	Support delegated admin rights.	Admin	Medium	
8.4	Generate system and usage reports.	Admin	Medium	

8.5	Support export of audit logs.	Audit	High	
-----	-------------------------------	-------	------	--

9. Support, Maintenance, and SLAs

Ref	Requirement	Type	Priority	Notes
9.1	Provide tiered support options with defined response times.	Support	High	Specify hours and channels.
9.2	Define clear incident-severity levels.	Support	Medium	
9.3	Provide online ticketing or help desk system.	Support	High	
9.4	Offer knowledge base or support portal.	Self-service	Medium	
9.5	Commit to a named technical account manager.	Relationship	Low	Optional but desirable.

End of Appendix B

Appendix C – Current System Overview

This appendix provides an overview of the current systems, data landscape, and operational processes that the new Grant Making System and CRM will replace or integrate with.

It is provided to help suppliers understand the migration, integration, and change-management implications.

1. Overview of Current Environment

The Tudor Trust currently uses Blackbaud Grant Making (BBGM) as its principal grants-management database.

BBGM supports application tracking, grant approval, and reporting, but has limitations around flexibility, data visibility, and integration with other organisational systems.

In addition, the Trust uses several other platforms and processes for operational functions:

Area	Current Tools/Systems	Key Notes
Grant tracking and reporting	Blackbaud Grant Making (BBGM)	Hosted externally; includes basic workflows and reports.
Document management	Files are attached and held in BBGM currently	Used for storage of documents, correspondence, and templates.
Communication	Microsoft Outlook and Teams	For internal/external correspondence, calendaring and chat
Financial reconciliation	The Trust's accounts and banking systems	Payments and reconciliations are recorded manually or via CSV imports.
Monitoring and learning	Excel and Word-based templates	Used for grant reporting and evaluations.

2. Key Limitations and Challenges

The current system landscape presents several operational and technical challenges:

Area	Issue	Impact
Integration	Limited interoperability between BBGM and other systems.	Manual data transfer, duplication, and errors.
Reporting	Restricted customisation options in BBGM.	Difficult to generate insight and learning reports.
Workflow	Static workflows with limited flexibility.	Processes require manual intervention or external tracking.
Data quality	Inconsistent data entry and structure.	Reduces confidence in reporting accuracy.
Financial reconciliation	Manual export/import process with the Trust's accounts and banking systems.	Time-consuming, error-prone, and lacks real-time visibility.
Accessibility	Limited modern interface and mobile support.	Impacts efficiency for staff working remotely or flexibly.

3. Data and Volume Overview

The following estimates are provided for context.

Suppliers should treat them as indicative, and final migration volumes will be confirmed during the discovery phase. The current BBGM data will be selectively imported into the new system, and the remaining legacy data will need to be accessible via search.

Data Category	Approximate Records	Notes
Grant records	~10,000	Includes active, closed, and historical grants.
Organisations	~4,000	Charities, community groups, and partners.
Contacts	~7,000	Individuals linked to organisations and grants.
Documents	~15,000	Stored or held in BBGM.
Financial transactions	~10 years of records	Stored in the Trust's accounts and banking systems.

4. Data Flow Summary

Currently, data flows between systems are primarily manual, with limited automation.

Current Data Flow Description:

- Grant records are created and maintained in BBGM.
- Financial payment data is exported to the Trust's accounts and banking systems for reconciliation.
- Monitoring reports and outcome data are collected manually and uploaded as files.
- Communication history (emails, calls, meetings) is stored separately in Outlook and Teams.
- Key decisions and updates are shared across staff via internal documents and spreadsheets.

5. Technical Architecture Overview

The current system architecture can be summarised as follows:

```

[Potential partners]
  ↓ (forms / email)
[BBGM database]
  ⇔ (manual export/import)
[The Trust's accounts and banking systems]
  ⇔ (documents)
[BBGM document store]
  ⇔ (communication)
[Outlook / Teams]
```

All systems operate independently, with limited integration between them.

The Trust's goal is to move toward a more integrated, secure, and insight-driven architecture, with the new Grant Making System and CRM serving as the core operational hub.

6. Desired Future-State Considerations

The new Grant Making System and CRM should:

- Serve as the authoritative source for all grant-related data and relationship information.
 - Integrate seamlessly with Microsoft 365 and the Trust's accounts and banking systems.
 - Provide intuitive tools for reporting, insight generation, and learning.
 - Support secure, user-friendly access for all staff, including remote users.
 - Allow flexible workflows that reflect the Trust's relationship-based Grant Making approach.
 - Reduce manual data handling and duplication.
-

7. Transition and Migration Notes

Suppliers should note:

- The Trust will provide full data exports from BBGM during discovery.
- Document links to BBGM repositories will need to be re-mapped or re-linked.
- Financial data interfaces must align with the Trust's accounts and banking systems using safe, verifiable import/export mechanisms.
- Minimal downtime is expected during transition.
- The migration process must ensure data integrity, auditability, and staff confidence.

End of Appendix C

Appendix D – Key Dates and Milestones

This appendix provides the **indicative timetable** for the Request for Proposal (RFP) process and subsequent project phases. Suppliers should use this timeline as a reference when planning their proposed approach and resource allocation. Dates may be refined following internal review and during contract finalisation.

1 RFP Process Timetable

Phase	Activity	Date / Deadline	Notes
1	Issue of RFP to potential suppliers	7 November 2025	Distributed electronically via email and shared folder access.
2	Deadline for supplier clarification questions	14 November 2025	All questions to be submitted by email to crmproject@tudortrust.org.uk
3	Publication of consolidated Q&A to all suppliers	21 November 2025	Responses will be anonymised and shared equally.
4	Deadline for submission of full proposals	28 November 2025 (17:00 GMT)	Electronic submission in PDF/Markdown formats preferred.
5	Shortlisting and evaluation period	1-5 December	Internal review and scoring against published criteria.
7	Supplier presentations and interviews	8-12 December 2025	Virtual or in-person sessions with the project team.
8	Selection and notification of preferred supplier	15-19 December 2025	Subject to internal approval and reference checks.
9	Contract finalisation and project initiation	January 2026	Kick-off meeting and onboarding of supplier.

2 Implementation Milestones

These are the **indicative delivery milestones** following supplier appointment. Specific deliverables and durations will be finalised collaboratively during the discovery phase.

Milestone	Description	Target Date	Dependencies / Notes
M1	Discovery and requirements validation complete	28 February 2026	Includes process mapping and design workshops.
M2	Detailed system design and configuration plan approved	31 March 2026	Agreement on functional and technical specifications.
M3	Proof of concept	30 April 2026	Iterative validation and feedback sessions.
M4	Data migration plan and test migration complete	31 May 2026	Sample data import and quality checks.
M5	User Acceptance Testing (UAT) period	June 2026	Includes staff training and iterative refinements.
M6	Final migration and go-live	End of July 2026	Minimal downtime transition from BBGM to the new system.

M7	Post-launch support and optimisation review	August–September 2026	Stabilisation, monitoring, and minor adjustments.
----	---	------------------------------	---

3 Supplier Responsibilities and Dependencies

Suppliers are expected to:

- Work collaboratively with The Tudor Trust project team to refine and maintain the delivery plan.
- Identify any dependencies (e.g., data migration complexity, third-party licensing, or integrations with the Trust's systems).
- Notify the Trust promptly of any risks that could affect agreed timelines.
- Commit adequate resources to ensure milestones are met on time and within scope.

4 Review and Change Control

All key milestones and deliverables will be reviewed jointly between The Tudor Trust and the appointed supplier. Any changes to scope or schedule will require formal approval through a documented **change-control process**. Progress will be monitored through regular project meetings and milestone reviews.

End of Appendix D

Appendix E – Supplier Response Template

This template should be used by suppliers to structure their proposals in response to the Tudor Trust Request for Proposal (RFP) for the Grant Making System and CRM.

Responses should be clear, concise, and directly address the requirements set out in the main RFP and Appendices A and B. All sections must be completed unless otherwise stated.

1. Supplier Details

Information	Response
Supplier name	

Registered address	
Company registration number	
Website	
Contact name	
Contact email	
Contact telephone	
Location of delivery team	
Sub-contractors (if applicable)	

2. Executive Summary

Please provide a brief overview of your organisation's understanding of the project, its objectives, and your proposed approach to delivering a successful Grant Making System and CRM implementation.

Suggested length: 300–500 words.

3. Solution Overview

Describe your proposed solution in relation to the RFP requirements. Include a summary of:

- System architecture and hosting model.
- Core functionality that supports Grant Making and CRM needs.
- Integration capabilities with Microsoft 365 and the Trust's accounts and banking systems.
- Security model, data management, and compliance features.

- Customisation and configuration options.

Attach diagrams or flowcharts if helpful.

4. Alignment with Functional Requirements (Appendix A)

Please complete the Functional Requirements Matrix (Appendix A) and reference it here.

Provide an overview of how your solution meets the functional requirements and note any areas that require configuration or custom development.

Category	Summary of Approach	Comments / Assumptions
Grant Lifecycle Management		
CRM and Relationship Management		
Financial Integration		
Reporting and Learning		
User Experience and Accessibility		

5. Alignment with Technical Requirements (Appendix B)

Provide a summary of your technical capabilities and compliance with Appendix B. Highlight any dependencies, exceptions, or innovative features your solution offers.

Technical Area	Compliance (Y/N/Partial)	Comment / Explanation
Architecture and Hosting		
Security and Compliance		
Data Migration and Management		
Integration and APIs		
Performance and Scalability		
Accessibility and Usability		
Support and Maintenance		

6. Implementation Approach and Project Plan

Outline your proposed approach to project delivery, including key phases and activities.

Phase	Activities	Deliverables	Indicative Dates
Discovery			
Design and Configuration			
Data Migration			
Testing and Training			

Go-Live and Support			
---------------------	--	--	--

7. Project Team and Experience

List the key members of your delivery team and their roles. Highlight relevant experience with similar projects, especially in the charitable sector.

Name	Role	Experience / Qualifications	Project Responsibility
------	------	-----------------------------	------------------------

Include short case studies or references if available (e.g., previous Grant Making system implementations).

8. Training and Change Management

Describe your approach to training Trust staff and supporting change management throughout the project.

Topic	Description	Format / Method
Administrator Training		
End-User Training		
Train-the-Trainer Programme		
Change Management Plan		

9. Support and Maintenance Proposal

Provide details of post-implementation support arrangements, including SLAs, response times, escalation procedures, and cost structure.

Support Level	Availability	Response Time	Resolution Target	Notes
Standard				
Enhanced				
Emergency / Critical				

10. Pricing Proposal

Provide a transparent pricing breakdown for each project phase and for ongoing support costs. All prices should be quoted in GBP (£) and exclude VAT.

Item	Description	Cost (£)	Notes
Discovery and Design			
System Configuration and Build			
Data Migration			
Training and Documentation			
Testing and UAT Support			
Go-Live Support			
Ongoing Support and Maintenance (per year)			
Optional Enhancements			

Total Estimated Cost		£	
-----------------------------	--	---	--

11. Assumptions and Dependencies

List any key assumptions or dependencies that may affect delivery or pricing. Include third-party software licences, infrastructure requirements, or data-migration dependencies (e.g., from BBGM or the Trust's accounts and banking systems).

12. Risk Register (Initial)

Provide a summary of foreseeable risks and your proposed mitigation strategies.

Risk Description	Likelihood (L/M/H)	Impact (L/M/H)	Mitigation
-------------------------	---------------------------	-----------------------	-------------------

13. References and Case Studies (Optional)

Please provide up to three relevant client references or case studies that demonstrate your experience with CRM and Grant Making system implementations in the non-profit sector.

Client Name	Project Scope	Delivery Year	Contact Details	Outcome Summary
--------------------	----------------------	----------------------	------------------------	------------------------

14. Declaration

By submitting this proposal, the supplier confirms that the information provided is accurate and complete to the best of their knowledge and that they agree to the terms and conditions set out in the RFP.

Authorised Signatory: _____

Name (printed): _____

Position: _____

Date: _____

End of Appendix E

End of main document

Supplier FAQ – Tudor Trust RFP

This FAQ provides clarification and guidance for suppliers preparing responses to The Tudor Trust's **Request for Proposal (RFP)** for the **Grant Making System and CRM**. It is intended to complement the main RFP and appendices and will be updated as needed throughout the procurement process.

1 General Information

1.1 What is the overall purpose of this project?

The project aims to replace the Trust's current **Blackbaud Grant Making (BBGM)** platform with a more modern, flexible **Grant Making System and CRM** that supports data-informed, relationship-based, and learning-centred Grant Making.

1.2 What type of organisation is The Tudor Trust?

The Tudor Trust is an independent charitable foundation that supports voluntary and community groups across the UK. Its work focuses on racial and social justice, inclusion, and strengthening communities.

1.3 What is the target go-live date?

The Trust expects the new **Grant Making System and CRM** to go live no later than **July 31st, 2026**.

1.4 What is the expected duration of the implementation?

The project is expected to run from **January 2026 through July 2026**, with early design and discovery activities beginning immediately after supplier selection and contracting in early January 2026.

1.5 Will the Tudor Trust consider consortium or joint submissions?

Yes. Collaborative proposals are welcome, provided there is a clear lead organisation responsible for contractual obligations and project delivery.

2 Proposal and Submission Process

2.1 How should suppliers submit their proposals?

Proposals should be submitted electronically by email to **crmproject@tudortrust.org.uk** by **28 November 2025 at 17:00 GMT**. Responses must use the information format provided in **Appendix E – Supplier Response Template**.

2.2 What formats are acceptable for submission?

Proposals should be submitted in **PDF** or **Word** format. Supporting materials may be provided as separate files (e.g., diagrams, case studies, or references).

2.3 Can clarification questions be submitted?

Yes. Suppliers may submit clarification questions by **14 November 2025** to **crmproject@tudortrust.org.uk**. All questions and answers will be anonymised and shared with all participating suppliers by **21 November 2025**.

2.4 Will late submissions be accepted?

No. Submissions received after the deadline of **28 November 2025 (17:00 GMT)** will not be considered unless there are exceptional documented circumstances.

2.5 Is there a budget range for this project?

While the Trust has a defined internal budget, it is not publishing a fixed value to ensure suppliers provide realistic and fully costed proposals aligned with the project's scope and ambition.

2.6 Who should be the main point of contact for supplier enquiries?

All correspondence should be directed to: crmproject@tudortrust.org.uk

3 Technical and Functional Considerations

3.1 What is the current system used for grant management?

The Trust currently uses **Blackbaud Grant Making (BBGM)** for grant tracking and reporting. Financial processes are managed through **the Trust's accounts and banking systems**.

3.2 Will historical data from BBGM need to be migrated?

Yes. The new system must support migration of all relevant historical data, including grant records, organisations, contacts, documents, and payment history. Most of the BBGM data will be considered archival only but should still be searchable. Suppliers should outline their proposed approach to migration in their responses.

3.3 How are financial transactions currently managed?

Financial transactions are currently exported from BBGM and reconciled manually with **the Trust's accounts and banking systems**. The new system should consider opportunities to streamline this process where possible, using secure and auditable data exchange mechanisms.

3.4 Will the new system need to integrate with other software?

Yes. The system should integrate with:

- **Microsoft 365** (email, document management, calendar)
- **SharePoint**
- **Miro boards** (embedded or via API)
- **The Trust's accounts and banking systems**
- Other future systems via API or export/import functions

3.5 What level of customisation is expected?

The Trust prefers configuration over custom code wherever possible to improve maintainability. Suppliers should describe how their solution can be tailored through no-code or low-code configuration.

3.6 What are the data hosting and security expectations?

- Data must be hosted within the UK or EEA.
 - The system must comply with **UK GDPR** and the **Data Protection Act 2018**.
 - Encryption must be used for all data at rest and in transit.
 - Role-based access controls and audit logging are mandatory.
-

4 Evaluation and Selection

4.1 How will proposals be evaluated?

Proposals will be scored according to the following weighted criteria:

Criterion	Weighting
Technical fit and functionality	25%
Implementation approach and experience	25%
Cost and value for money	15%
Understanding of Tudor Trust values and approach	25%
Support, training, and sustainability	10%

4.2 Will there be supplier interviews or demonstrations?

Yes. Shortlisted suppliers will be invited to present their proposals and demonstrate their solutions between **8–12 December 2025**. Sessions will be held virtually unless otherwise arranged.

4.3 When will the preferred supplier be announced?

The preferred supplier will be notified on the week commencing **15 December 2025**, subject to internal governance approval and contract negotiation.

4.4 Will feedback be provided to unsuccessful suppliers?

Yes. The Trust will provide high-level feedback to all suppliers after the selection process concludes.

5 Implementation and Support

5.1 What approach to implementation is expected?

The Trust expects an **agile and collaborative approach** to implementation, with iterative design, testing, and validation throughout the build and migration phases.

5.2 What post-launch support is expected?

The selected supplier must provide:

- Ongoing system maintenance and updates.
 - Tiered technical support with defined SLAs.
 - Access to a knowledge base and help desk.
 - Options for continuous improvement or enhancement.
-

5.3 Will staff training be part of the contract?

Yes. The supplier must deliver training for administrators and end-users and support a “train-the-trainer” approach to ensure sustainability.

5.4 What is the expected method of data exchange with financial systems?

The Trust anticipates secure import/export processes (e.g., CSV, ODBC, or API) to facilitate data transfer between the Grant Making System and CRM and **the Trust's accounts and banking systems** as well as other tools that may be integrated.

5.5 What are the expectations for accessibility and inclusion?

The system must meet a minimum of **WCAG 2.1 AA** accessibility standards and support inclusive design principles. Suppliers should describe how accessibility is tested and maintained in their solutions.

6 Legal and Contractual Matters

6.1 Will the Tudor Trust use its own contract terms?

Yes. The Trust will provide draft contractual terms during the final negotiation phase in early January 2026. Suppliers may propose amendments, which will be reviewed case by case.

6.2 How will intellectual property (IP) be handled?

All project deliverables and configurations produced specifically for The Tudor Trust will become its property upon completion and payment. Suppliers retain IP for pre-existing proprietary components.

6.3 Will there be data protection requirements?

Yes. The supplier may be required to act as a **data processor** under the UK GDPR framework and sign a **Data Processing Agreement (DPA)** with the Trust.

6.4 What are the payment terms?

Payment terms will be agreed upon during contract finalisation but are typically **30 days from receipt of a valid invoice**. Milestone-based invoicing will be preferred.

6.5 Who should suppliers contact with contractual or legal questions?

All questions should initially be directed to crmproject@tudortrust.org.uk. If legal review is required, the Trust's appointed representative will respond directly.

End of Supplier FAQ

RFP Summary Sheet

Tudor Trust – Grant Making and Relationship Management System

Issue Date: 6 November 2025 **Submission Deadline:** 28 November 2025 (17:00 GMT) **Contact:** crmproject@tudortrust.org.uk

1. Project Overview

The Tudor Trust invites proposals from experienced and values-aligned partners to co-design and deliver a new, future-ready Grant Making system and CRM.

This project represents the next step in our digital evolution — **building on the strengths and lessons of our current Blackbaud Grant Making (BBGM) platform** — to create a system that supports our learning-centred, relationship-based and racially-just approach to philanthropy.

We are seeking a collaborative development partner who shares our commitment to **ethical, non-extractive practice** and can work with us to co-design a system that reflects how we work and learn together.

This RFP draws on findings from several **2025 Database Workshops** and the **Tudor Trust Database Brief**, which identified the need for a more flexible, intuitive, and human-centred system.

2. Key Objectives

- Commence operational use no later than **the end of July 2026** with minimal downtime.
- Support intuitive, proportionate workflows aligned with real Grant Making practice.

- Enable clear visibility of decisions, relationships, and networks.
- Integrate with daily tools such as **Microsoft 365, SharePoint, Outlook, Miro** and **Sage 50**.
- Capture learning and reflection without creating extractive reporting burdens.
- Maintain data security, GDPR compliance, and ethical integrity.

3. Implementation Approach

Two-Phase Delivery Model

Phase 1 – Core Grant Making and CRM (Jan–July 2026)

Build and deploy the foundational Grant Making, contact, and workflow functionality, ensuring full migration from BBGM and staff training.

Phase 2 – Learning & Reflection Layer (Post-Go-Live)

Add features to support reflective practice, data-informed insights, and learning analytics once core operations are stable.

4. Deliverables and Milestones

Phase	Milestone	Target Date
Discovery & Co-design	Requirements confirmed	Feb 2026
Prototype	Configured system ready for feedback	Apr 2026
Data Migration	Testing and validation complete	May 2026
Training & Readiness	Staff trained and documentation complete	Jun 2026
Go-Live	System operational	Jul 2026
Phase 2 Enhancements	Learning layer design and rollout	Late 2026
Post-Implementation Review	Evaluation and lessons learned	Oct 2026

5. Budget and Contract

Item	Detail
Indicative budget	£80 000 – £120 000 (inclusive of setup, training, and first-year support)
Payment schedule	20 % on contract / 40 % after migration / 30 % at go-live / 10 % post-review
Contract term	12 months with extension options
Hosting preference	UK / EEA SaaS or hybrid cloud (ISO 27001 certified)

6. Evaluation Criteria

Criterion	Weighting
Technical fit and functionality	25%
Implementation approach and experience	25%
Cost and value for money	15%
Understanding of Tudor Trust values and approach	25%
Support, training, and sustainability	10%

7. Submission Details

- **Deadline:** 28 November 2025 (17:00 GMT)
- **Clarification questions by:** 14 November 2025 (17:00 GMT)
- **Interviews:** 8 – 12 December 2025
- **Preferred supplier selected:** by **19 December 2025**
- **Contract signing** week commencing **12 January 2026**
- **Project start:** **16 January 2026**

Submit proposals via email to: crmproject@tudortrust.org.uk Subject line: *"Tudor Trust RFP Submission – [Your Organisation Name]"*

8. Reference Documents

Ref	Title	Description
Main RFP Document	Core specification and response instructions	Primary tender document
Appendix A	Functional Requirements Matrix	Must-have and should-have features
Appendix B	Technical Requirements Checklist	Hosting, security, accessibility, and ethics
Appendix C	Current System Overview	Context and migration guidance
Appendix D	Key Dates and Milestones	Timeline overview
Appendix E	Supplier Response Template	Standard format for proposals

9. Contact and Clarifications

All communication regarding this RFP should be directed to: **crmproject@tudortrust.org.uk**

Clarification responses will be shared (anonymised) with all suppliers to ensure fairness and transparency.

10. About the Tudor Trust

The Tudor Trust is an endowed charitable trust, committed to deploying its capital in ways that centre racial justice as a lens through which to address the intersections of all injustice. This commitment will guide our grant-making.

Strategically, and in line with our Change We Seek strategy, we take a systems thinking approach to vision a world that is more just and equitable.

*“We believe technology should amplify trust and learning — not replace them.” — Tudor Trust
Digital Working Group*