

Request for Proposals- Salesforce Grants Integration Consultant

Consultant to Support Integration of a Grants Application and Management Platform into Salesforce for the Lake Michigan School Food Systems Innovation Hub

Introduction: The United States Department of Agriculture (USDA) School Food System Transformation Challenge seeks to transform school food systems through innovative practices that increase student access to healthy meals. Led by the Illinois Public Health Institute (IPHI), the Lake Michigan School Food Systems Innovation Hub (Innovation Hub) will implement the USDA Challenge to spark innovation and strengthen the Lake Michigan K-12 food system to improve schools' access to nutritious, local, and culturally relevant products in Illinois, Michigan, Northern Indiana, and Wisconsin. As part of this initiative, IPHI is seeking proposals from qualified consultants to help integrate Force.com's grant application and management tool into the existing IPHI Salesforce platform and build two applications into the system.

Proposals for the Salesforce Grants Integration Consultant are due by May 25th 2023, 5:00pm CT, and should be submitted to janna.simon@iphionline.org with the subject "Innovation Hub Salesforce Grants Integration Proposal."

Project Background: The partners leading the Lake Michigan School Food Systems Innovation Hub will collectively identify and make awards to local and regional collaboratives to strengthen and adapt the food system to enable schools to serve their students culturally relevant, delicious foods that align with current USDA Transitional Standards, as well as future meal pattern iterations. Collaboratives of schools/school districts, food producers, suppliers, distributors, and their community partners will receive tailored training and technical assistance from Innovation Hub partners to support innovations, especially around food production and supply chains, to create a more resilient and equitable food system from which schools and students can benefit. With IPHI leading the grant administration and sub-granting process, a State Lead organization from each state will support training and technical assistance to innovative collaboratives in their states to implement these programs. The project prioritizes inclusion of socially and economically disadvantaged farmers, food producers, and food industry partners and on advancing innovation in communities with lower incomes, communities of color, rural communities, Tribal communities and other historically disadvantaged communities.

IPHI uses a customized version of Salesforce as a constituent management system to track partnerships, working group members, and various program activities via campaigns. The consultant will need to be able to work within this customized system and work with multiple departments within IPHI to ensure the initial integration meets organization-wide needs for this project and future grants management/application needs. For the Innovation Hub project, sub-grants will be given out to collaboratives in two ways: Spark Awards will be provided annually to support smaller projects that need less support and/or less time to realize. The first round of Spark Awards is anticipated in the fall of 2023. In early 2024, larger, multi-year Innovation

Collaborative awards will be provided for larger/longer projects. The Salesforce grant application portal will need to accommodate both types of award applications/processes.

Scope of Work:

- Working within IPHI's customized Salesforce database/system, work with IPHI's IT/Salesforce manager, Department Leaders, and the Innovation Hub project team to integrate the Salesforce Grants Management System into the existing system.
- Ensure the integrated Salesforce grants management and support system has the capacity to house the Request for Application (RFA), allow sub-grant applicants to successfully submit applications, and for IPHI to accept, manage, store, and index applications on the backend. By August 15th, 2023.
- Help IPHI build two grant applications in the system, one for the Spark Awards and one for the Innovation Collaborative Awards. Spark Awards by August 31st, 2023, and Innovative Collaboratives by December 1st, 2023.
- Provide at least one training to IPHI staff on how to navigate the backend of the system, manage and, store and index applications, and, if possible, how to build future grant applications. By September 31st, 2023.
- Explore/work with the IT/Salesforce Manager and IPHI Finance Team to ensure the grants/management system successfully integrates with IPHI's Sage Intacct accounting and finance system by December 1st, 2023.
- Provide ongoing support/answer technical questions from staff through December 31st, 2023.

Timeline:

- Initial integration of the system by August 15th, 2023
- Spark Award application ready for review by partners/USDA by August 31st, 2023
- Training for IPHI staff on use of new system by September 31st, 2023
- Innovation Collaborative application ready for review by partners/USDA by December 1st, 2023.
- Work with the IPHI finance team to explore/work to ensure integration with Sage Intacct by December 1st, 2023

Preference:

- Preference will be given to contractors that meet the USDA definition of economically and socially disadvantaged:
 - Small businesses owned by individuals that have faced barriers to access to the capital, markets, and networks they need to grow their businesses because of certain statuses or membership in certain groups, including membership in a group that has been subjected to racial or ethnic prejudice or cultural bias within American society and;

- Small businesses in Community Development Financial Institution Investment Areas, which are generally low-income, high-poverty geographies that receive insufficient support for the needs of small businesses, including minority-owned businesses.
- Preference will be given to vendors certified as Minority Business Enterprise (MBE) or Women Business Enterprise (WBE) in the Cook County or Chicago MBE/WBE system.

Budget: Up to \$50,000

Proposal Information:

Proposals should include the following information and should be no longer than five pages:

- Interest in working on this project.
- Proposed approach, methodology, and timeline for fulfilling the scope of work.
- A description of relevant experience and qualifications.
- A budget for the proposed work, including hourly rate and estimated number of hours for each task.
- Examples of relevant previous work and references from previous clients. The proposal should provide at least two references from previous clients.
- Information about alignment with one or more preferences, detailed above, if applicable.

Qualifications:

- Demonstrated ability to integrate Salesforce grants management systems, including in Salesforce systems that have been customized.
- Commitment to meeting the project's goals and objectives within the allocated budget and timeline.
- Preference for contractors that align with preferences, detailed above.

Submission:

Proposals and/or questions for the Salesforce Grants Management Integration Consultant are due by May 25th, 2023, 5:00pm CT, and should be submitted to janna.simon@iphionline.org with the subject "Innovation Hub Salesforce Integration Proposal." IPHI may conduct interviews with selected firms prior to making a final selection. We look forward to receiving your proposal.

USDA Nondiscrimination Statement and Attribution

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotope, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

USDA is an equal opportunity provider, employer, and lender.

This project has been funded at least in part with Federal funds from the U.S. Department of Agriculture. The contents of this publication do not necessarily reflect the view or policies of the U.S. Department of Agriculture, nor does mention of trade names, commercial products, or organizations imply endorsement by the U.S. Government.