

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

Request for Proposal (RFP) for a comprehensive Grant Management Software

RFP Date: July 31, 2026

University of Chicago Trust (UCT) is a charitable trust in India, established by friends of the University of Chicago. The objectives of the Trust are to provide opportunities for grants to support educational programs, research programs and activities for the betterment of India.

The University of Chicago Trust (UCT) invites proposals from qualified and experienced vendors for the supply, configuration, implementation, training, and support of a Grants Management Software Solution. UCT seeks a solution that will streamline and standardize the grant lifecycle management process, improve visibility across stakeholders, strengthen compliance oversight, and enhance grant monitoring and reporting capabilities.

The selected solution should support grant management activities from application intake through award closure while providing appropriate access controls, workflow automation, document management, and reporting capabilities.

1. Scope of Work

The proposed Grants Management Software should support the complete grant lifecycle—from identification of funding opportunities through proposal development, award management, implementation, financial monitoring, reporting, and grant closure. The solution should provide workflow automation, document management, approval workflows, dashboards, notifications, and audit trails.

Note: UCT's accounting system will **not** be integrated with the proposed solution. Financial data (Budget vs Actuals and project-wise financial MIS) will be uploaded periodically by UCT's third-party finance team using standardized Excel templates. The system should facilitate generation of segregated financial dashboards (Local vs Foreign funding) and be able to generate management reports in multiple currencies based on the uploaded data.

A. Grant Opportunity & Proposal Management (Pre-Award)

Process Flow

Grant Opportunity → Proposal Preparation → Internal Reviews → Approval → Proposal Submission → Awarded / Unsuccessful

Scope

- Maintain a centralized database of all funding opportunities and proposals.

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

- Capture key proposal information (donor, project, budget, timelines, proposal owner, status, etc.).
- Support standard and donor-specific proposal and budget templates.
- Facilitate multi-level review and approval workflows for proposals and budgets.
- Maintain document versions, review comments, and approval history.
- Track proposal status and send automated reminders.
- Generate proposal pipeline and success-rate dashboards.

B. Grant Award & Contract Management

Process Flow

Award Notification → Agreement Review → Negotiation → Approval → Agreement Signing → Grant Registration

Scope

- Register all awarded grants in a centralized database.
- Support multi-level review and approval of grant agreements.
- Maintain agreement versions, negotiation history, and approvals.
- Automatically generate Grant IDs and internal project/accounting codes.
- Link approved proposals, budgets, agreements, and supporting documents.

C. Grant Implementation & Monitoring

Process Flow

Grant Activation → Activity Monitoring → Progress Updates → Management Review → Grant Closure

Scope

- Track key milestones, deliverables, reporting schedules, and project status. Link milestone completion to payment schedule alerts. Flag when a payment tranche is due but the associated milestone has not been marked complete.
- Assign responsibilities and monitor pending activities.
- Generate reminders for upcoming and overdue actions.
- Provide high-level implementation dashboards.

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

D. Reporting & Compliance

Process Flow

Reporting Schedule → Reminder → Report Preparation → Review → Submission → Compliance Tracking

Scope

- Track reporting deadlines and compliance requirements.
- Generate automated reminders.
- Maintain reporting history and grant close-out records.

E. Financial Monitoring

Process Flow

Excel MIS Upload → Data Validation → Dashboard Generation → Management Review

Scope

- Import standardized Excel-based financial MIS.
- Generate Budget vs Actual dashboards.
- Monitor budget utilization, burn rate, grant balances, and expenditure trends.
- Highlight significant variances and budget overruns.
- Produce grant-wise , fund-wise (local vs foreign funding), donor-wise, and programme-wise financial reports.

Provide configurable dashboards and reports covering:

- Proposal Pipeline
- Active Grants
- Financial Performance (Budget vs Actual)
- Compliance Status
- Reporting Deadlines
- Executive Portfolio Summary

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

F. Document Management

Scope

- Maintain a centralized repository for all grant documents.
- Support version control, document search, controlled access, and audit trails.

G. Workflow Automation & User Management

Scope

- Automate approvals, task assignments, notifications, and escalations.
- Support configurable workflows and role-based user access.
- Maintain complete audit logs of all system activities.

2. Eligibility Criteria

The agency must confirm that they meet all the following minimum requirements:

- Legally registered entity in India with at least 5 Years of experience in corporate or institutional grant management.
- Demonstrated experience handling grant management for corporates, NGOs, academic institutions, or similar organisations
- Capability to provide a dedicated key account manager and round-the-clock emergency support.

Confirmation of meeting the eligibility requirements should be noted/disclosed in the proposal.

3. Submission of Proposals

RFP Date: [July 20, 2026](#)

Email for any queries within four days of RFP date: uctops@uchicagotrust.org

Bid submission deadline : [August 20, 2026](#)

Password submission timeline: [August 21, 2026](#)

Bid submission guidelines:

- Bids are to be submitted in the Bid submission format-Excel workbook that has separate worksheets for Technical and Financial bids

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

- Please fill in the bid submission formats ([Technical and Financial proposals](#)) and send the password protected file to the following email address: uctops@uchicagotrust.org
- Please share password on the same email id: uctops@uchicagotrust.org post the bid submission date and time on **August 21, 2026**
- The Clarification and Amendment of RFP Documents- Agencies may request a clarification within 4 working days of RFP published.
- Prices quoted must remain valid for 45 days from the proposal submission deadline.
- The Organisation reserves the right to accept or reject any or all proposals without assigning reasons.
- Any attempt to influence the evaluation process will result in disqualification.
- Any proposal submitted after the stipulated deadline shall be rejected. Only the Procurement Committee may, at its sole discretion, consider a delayed submission in exceptional cases.
- Incomplete application forms are liable to be rejected. No further correspondence will be entertained from rejected applicants.
- Quotations received without password will be rejected.
- The selected agency shall sign a formal contract/work order incorporating the RFP, their proposal, and mutually agreed terms.
- UCT reserves the right to accept or reject any or all proposals received as result of this request, to negotiate with all qualified applicant(s) or to cancel this RFP, if it is in the best interests of UCT to do so.
- The decision of UCT shall be final.

Note: Feel free to add rows to bid submission format if you want to input any additional information including any additional value added services. Do not delete any rows or alter the format

Documents to be submitted:

- Technical and finance proposal (Password protected Bid submission format as per guidelines note above)-**Please find the attachment appended to this RFP**
- [Vendor registration format](#) (**Please find the format appended to the RFP**) and related documents and certifications (Certificate of incorporation, MSME registration, PAN, TAN, GST, IATA accreditation)
- Reference letter from Client
- Audited financials of last three years
- Technical proposal narrative aside from the Technical bid submission format in excel that showcases or describes the services in details (Refer point 3.1 below)

3.1 Technical Proposal – Required Contents

- Company profile (including the Vendor Registration form along with the required documents)
Description of the proposed service model (online booking tool, mobile app, etc.)
- Approach to design and implement Grant Management Software
- Description of 24×7 support arrangements and escalation matrix

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

- Proposed implementation plan (onboarding, system configuration, training)
- Sample MIS/report formats
- Details of technology platforms, integration capabilities, and data security controls
- List of key clients with sector, scale, and tenure
- The application of the agency should be signed by the authorised signatory confirming that all the details furnished in the application are true and correct to the best of his/her knowledge and that in case any false information or suppression of any material information is furnished, the application shall be liable for rejection by UCT.
- The technical proposal should include the standard terms and conditions of the contract that the client is expected to sign.
- Ensure secure and confidential handling of all data, including personal and passport information, in compliance with applicable data protection laws. Such data shall be used solely for the purposes of this engagement and not disclosed or retained beyond the contract term, except as required by law. Any data breach shall be promptly reported to the Authority and UCT.
- Include the outline their proposed Service Level Agreements (SLAs), including booking turnaround times, emergency response, refund and cancellation timelines, and escalation support, which will form an integral part of the evaluation.

3.2 Financial Proposal – Required Contents

Please refer the recommended Bid submission format (To be password protected prior to submission). All prices must be quoted in INR, exclusive of taxes (taxes to be shown separately).

3.3 Testing

The system must be able to be tested by the UCT team either prior to paid implementation or as part of a trial period.

4. Evaluation Process

- The technical proposal will be evaluated based on the criteria defined by UCT. The technical evaluation shall carry a weightage of **60%**. Shortlisted vendors will be invited to give presentations/demos, of their services.
- The Financial bid which depicts the rates of various services on offer, will be accordingly evaluated by UCT and shall carry a weightage of **40%**.

Award of Contract- After completing the evaluation process, UCT shall issue a Purchase Order / Service Agreement to the selected agency for a period of one year and may be renewed based on

UNIVERSITY OF CHICAGO TRUST

11, First Floor, Global Tech Park, O' Shaughnessy Road, Langford Town, Bengaluru, Karnataka – 560025, India

satisfactory performance. Either party may terminate the contract by providing thirty (30) days' prior written notice

Confidentiality- Information relating to evaluation of Proposals and recommendations concerning awards shall not be disclosed to the agencies who submitted the Proposals or to other persons not officially concerned with the process.