Agency Acquisition Guide

April 2025

Contents

Introduction

This *Agency Acquisition Guide* details the steps for acquiring a grants award management system (AMS) to help you streamline your solicitation with support of the Grants Quality Service Management Office (QSMO). Whether you need market research on grants management systems, insights from previous modernization efforts, or additional supplementary resources, we are ready to assist you throughout the acquisition process. The Office of Management and Budget (OMB) mandates agencies collaborate with the Grants QSMO when planning for their grants IT needs.[1]

In addition to the recommendations in this guide, you should coordinate with all relevant internal stakeholders, including the grants office(s), Chief Financial Officer, Chief Information Officer, Contracting Officer, and other applicable parties early and often. This collaboration ensures unified support and alignment for the final solicitation.
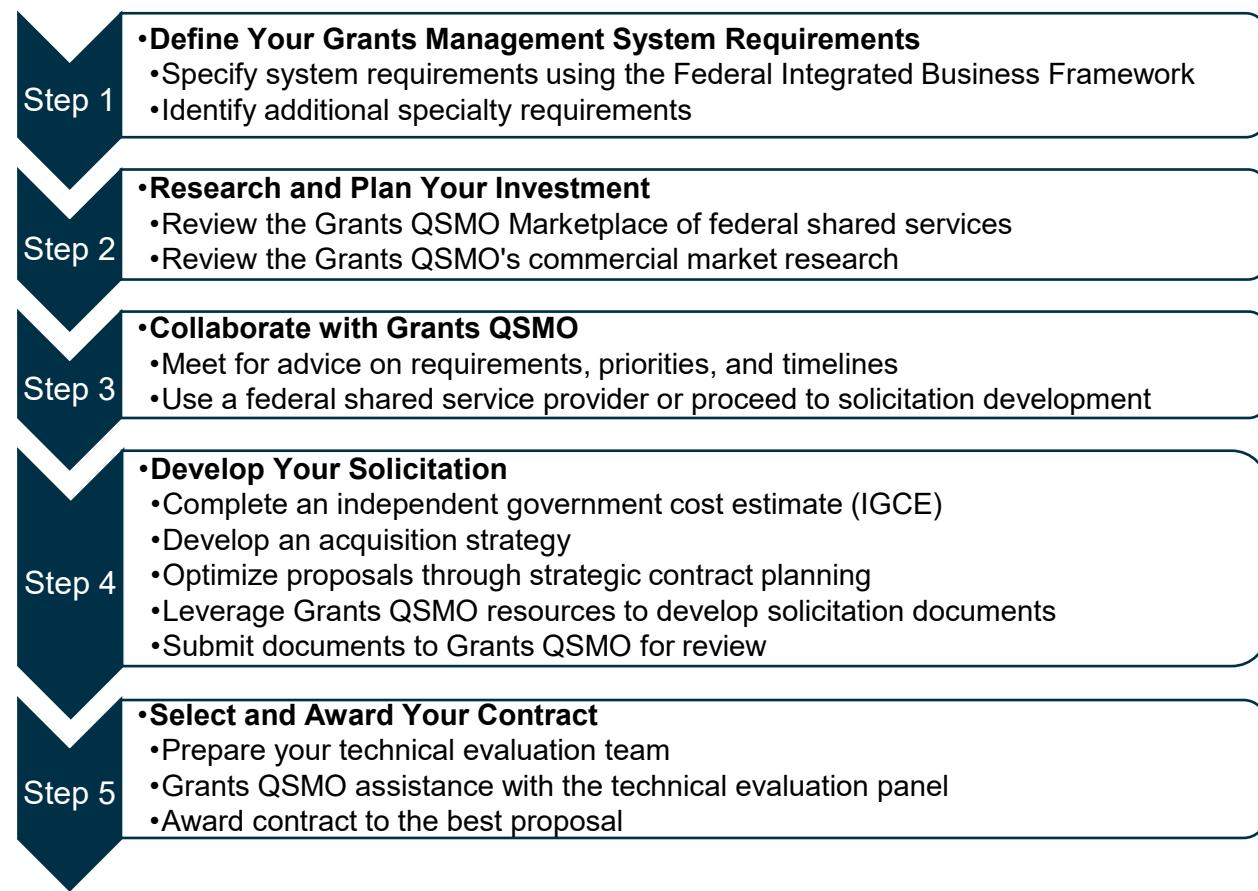
In the case of any conflict between this guide and General Services Administration (GSA) Multiple Award Schedule (MAS) terms, MAS terms take precedence.

---

[1] OMB Memorandum M-19-16, *Centralized Mission Support Capabilities for the Federal Government*, mandates that agencies must have an approved business case, involving the Senior Accountable Point of Contact (SAPOC), Chief Information Officer (CIO), QSMO, and OMB, to justify new grants-related technology or service procurements, ensuring better value.

2 CFR §1.305 emphasizes agency responsibilities, including coordinating with the Grants QSMO to ensure proper implementation and compliance of the guidance.

Process At-A-Glance

Step 1	•**Define Your Grants Management System Requirements**
	  •Specify system requirements using the Federal Integrated Business Framework
	  •Identify additional specialty requirements

Step 2	•**Research and Plan Your Investment**
	  •Review the Grants QSMO Marketplace of federal shared services
	  •Review the Grants QSMO's commercial market research

Step 3	•**Collaborate with Grants QSMO**
	  •Meet for advice on requirements, priorities, and timelines
	  •Use a federal shared service provider or proceed to solicitation development

Step 4	•**Develop Your Solicitation**
	  •Complete an independent government cost estimate (IGCE)
	  •Develop an acquisition strategy
	  •Optimize proposals through strategic contract planning
	  •Leverage Grants QSMO resources to develop solicitation documents
	  •Submit documents to Grants QSMO for review

Step 5	•**Select and Award Your Contract**
	  •Prepare your technical evaluation team
	  •Grants QSMO assistance with the technical evaluation panel
	  •Award contract to the best proposal

Define Your Grants Management System Requirements

The essential first step in the acquisition process is defining your organization's requirements for a grants management solution or service.[2] Consult the Federal Integrated Business Framework (FIBF)[3] for Grants Management (GRM)[4] to determine the type and scope of your requirements. Thorough, detailed requirements based on the FIBF GRM will be the framework on which your entire acquisition is built, and the importance of this step cannot be overstated.

---

[2] In grants management, a "solution" refers to a software system and its associated hardware (usually cloud-hosted), along with the technical support staff for maintenance, while a "service" involves using an external source (contractor) to process and evaluate information, such as indirect cost rate negotiation or grant funding slate development.

[3] The FIBF is a model that helps the Federal government coordinate and document common business needs across agencies, focusing on outcomes, data, processes, and performance, to drive economies of scale and leverage buying power.

[4] The FIBF GRM, established by OMB, GSA, and federal awarding agencies, breaks down the grants business lifecycle into component processes.

Specify System Requirements using the Federal Integrated Business Framework for Grants Management

The FIBF GRM business standards empower you to clearly define your organization's specific requirements using a standard framework. Leveraging the FIBF GRM, you will more easily assess if a solution or service provider meets your needs. Alignment to the FIBF GRM sets the stage for agreement on outcomes and cross-functional end-to-end processes that drive economies of scale and leverage the government's buying power.

- FIBF GRM Federal Business Lifecycle
- FIBF GRM Business Capabilities
- FIBF GRM Use Cases
- Technology Design and Operation Capabilities[5]

Grants Data Standards Requirements

It is important to reference grants data standards as a requirement during planning to help you ensure any new system complies with law and policy. The Grants Data Standards team in the HHS Office of Grants is currently working to establish standard data elements that will reduce grant recipient burden and compliance costs, drive quality analysis of grants data, improve grant and program management outcomes, and improve interoperability and information exchange between government systems in accordance with the Grant Reporting Efficiency and Agreements Transparency Act of 2019 (GREAT Act) and OMB Memorandum M-24-11.

For more detail on the legal and policy framework for grants data standards and technical information about standard data elements for use in grants processing please visit the Grants Data Standards page at Grants.gov.

Additional Requirements

In addition to FIBF GRM and data standards, consider requirements unique to your organization, such as multi-language support, higher security controls, or rapid implementation, that will factor into your acquisition. Refer to the *Optimize Proposals through Strategic Contract Planning* section of this document for additional factors when defining your requirements. Keep in mind that software customization increases cost and implementation timelines.

You might also find it helpful to review other agencies' solicitation documents on the Grants QSMO's Acquisition Gateway page.

---

[5] Outlines the technical and operational capabilities and references to federal cybersecurity and IT standards and specifications defined by the CIO Council.

Research and Plan Your Investment

After identifying and defining your organization's requirements, the next step is to explore possible solutions. While agency engagement with the Grants QSMO is required by OMB for grants IT investments, agencies are encouraged to explore the Grants QSMO Marketplace and Acquisition Gateway to get started.

Both federal shared services and commercial solutions are available for your grants management needs. Analyze multiple options to determine which best fits your requirements, scope, timeline, and budget.

Review the Grants QSMO Federal Shared Services Marketplace

The Grants QSMO Marketplace offers validated federal shared solutions and services from trusted providers. These solutions include grants management IT systems, grants payment request systems, and indirect cost rate negotiation services. They cover the grants management lifecycle and align with the FIBF GRM. Federal agencies can find detailed information on each solution to help them adopt shared services.

The Grants QSMO Marketplace is public, but Acquisition Gateway offers additional federal-only resources to help you evaluate Marketplace providers, notably Marketplace Buying Insights and Value Insights. Developed in collaboration with federal shared service providers, these resources promote transparency by providing information on provider capabilities, cost methodologies, customer satisfaction ratings, IT standard interfaces, grants volume, and more. They leverage internal and public data to support informed, strategic decisions on adopting shared solutions and services.

Review the Grants QSMO's Catalog of Market Research

If a federal shared service provider on the Grants QSMO Marketplace cannot meet your agency's grants IT requirements, additional offerings are available through the Grants QSMO's Catalog of Market Research[6]. The catalog contains extensive detail on vendors that are likely to meet the award management IT needs of federal awarding agencies.

Highlights from the Catalog are available publicly, and Acquisition Gateway offers federal-only resources, including the full Catalog of Market Research, Market Research Overview (which defines how the Catalog vendors were selected), and a Vendor Library of all vendors that responded to the RFI, including vendors of other types of solutions and services such as risk management and cybersecurity.

---

[6] The Grants QSMO Catalog of Market Research was created through a Request for Information (RFI) process that brought together more than 20 cross-government staff to review vendor responses.

While agency engagement with the Grants QSMO is required by OMB for grants IT investments, agencies are encouraged to explore the resources on Acquisition Gateway to get started. Review the Catalog of Market Research vendors, watch the demos they've recorded specifically for the Grants QSMO RFI, and reach out to them directly to discuss your needs.

You can submit our Grants QSMO Market Research Overview and the Catalog of Market Research to your Contracting Officer (CO) to meet the market research requirements of your solicitation process.

Table 1 Commercial Award Management IT Vendor Solutions highlighted in the 2025 Catalog of Market Research

Vendor	Solution	Platform Provider	Platform FedRAMP Status	Software FedRAMP Status	Business Type
Ernst and Young LLP	EY Grants Accelerator	Microsoft	FedRAMP Authorized	FedRAMP In Progress	Other than Small
FI Consulting	Program Investment Manager (PIM)	Microsoft	FedRAMP Authorized	Inherited from Platform	Small
Groundswell	Grants Lifecycle Application System	Appian	FedRAMP Authorized	Inherited from Platform	Other than Small
REI Systems, Inc.	GovGrants	Salesforce	FedRAMP Authorized	Inherited from Platform	Other than Small
Salesforce, Inc. [a]	Public Sector Solutions Grantmaking	Salesforce	FedRAMP Authorized	FedRAMP Authorized	Other than Small
Unison Software, Inc.	PRISM Grants	PRISM	FedRAMP Authorized	FedRAMP Authorized	Other than Small

[a] Salesforce Public Sector Solutions for Grants Management (Grantmaking) can be configured and integrated via Salesforce services teams or system integrator partner organizations, including Tribally Owned, SBA Certified Small Disadvantaged, and SBA Certified 8(a) businesses. Please contact Salesforce or the Grants QSMO for more details regarding integration options.

Collaborate with the Grants QSMO

With clear requirements and context around the federal and commercial grants ecosystems, you are ready to start developing acquisition documents. If your research indicates a commercial acquisition, you *must* coordinate with the Grants QSMO for support and advice on your investment to develop, modernize, enhance, or procure a solution or service.

The Grants QSMO provides exceptional customer service by helping agencies align their Investment Action Plan (IAP) with the *Seven Guiding Principles for Grants Technology Modernization* (detailed in the IAP form), fully utilize Grants QSMO Market Research, shared resources, and best practices (e.g., GSA's Agency Modernization and Migration Management (M3) Playbook), and avoid duplicative technology investments across the government. Leveraging in-depth knowledge of federal and commercial grants management solutions, the Grants QSMO can review your requirements and help you prioritize your outreach, saving you time and effort.

Develop Your Solicitation

Agency solicitation development processes are not one-size-fits-all. Your assigned CO is your key contact who will provide essential guidance on this complex process. As you develop your solicitation, it's important to focus on the foundational elements and processes that will drive your success.

Empower Your Team with the Right Knowledge

Ensuring your team includes key contract personnel that possess a strong understanding of federal grants management (with a particular emphasis on Code of Federal Regulations (CFR) Title 2: Federal Financial Assistance) as well as IT experts, will enable your team to start off with a common understanding and move in a unified direction as you develop your solicitation, evaluate proposals, and implement your IT transformation.

Complete an Independent Government Cost Estimate

For a commercial acquisition, your CO will require an Independent Government Cost Estimate (IGCE) to determine the acquisition strategy. While information and templates for IGCEs can be found on various agency websites, your best resource is your CO, who can provide you with everything you need to complete this critical component.

Develop estimates that account for identified risks and assumptions, and request funding for the complete costs. Although each agency's commercial acquisition is different, refer to the Acquisition Gateway for example past Analysis of Alternatives to help support IGCE analysis for grants management systems.

Develop an Acquisition Strategy

Your estimated acquisition cost, implementation timeline, and priorities like small business inclusion or upfront funding requirements will influence the suitability of contract vehicles and types. Solutions in the Catalog of Market Research can be

acquired through GSA MAS, Alliant 2, and 8(a) STARS III. Key considerations for selecting your acquisition vehicle and approach include:

- **GSA MAS Select Vendor Pool**: FAR Part 8.405-2 allows you to leverage a select vendor pool for your solicitation, such as the Catalog of Market Research vendors, reducing the number of proposals you will receive and streamlining your acquisition of a Catalog of Market Research solution. You will need to choose a Special Item Number (SIN) for your solicitation that meets your needs and maximizes responses, such as 54151S IT Professional Services. Refer to the GSA MAS Ordering Guide for more details.

- **Governmentwide Acquisition Contracts (GWACs) Sole Source**: For acquisitions *under* $6 million, you can sole-source a contract on GWACs, including Alliant 2 and 8(a) STARS III. For acquisitions *over* $6 million, you are required to release your Request for Proposal (RFP) to the entire GWAC pool (Alliant 2 or 8(a) STARS III). *Orders issued under GWACs follow FAR 16.505 procedures*.

Optimize Proposals through Strategic Contract Planning

Beyond the initial business requirements, there are many questions to consider when preparing your solicitation. Grants QSMO resources like the Solicitation Checklist, Sample RFPs, and Past Performance Evaluation Questionnaire can help you address important considerations for your Request for Quotations (RFQ) or RFP. Remember that variations in funding, budget, expertise, preferences, and other factors may impact how agencies purchase their solutions, even for the same commercial product.

Potential Pitfalls

There are myriad considerations for crafting the best possible IT investment. Two major pitfalls Grants QSMO recommends avoiding are:

- *"Big Bang" Implementation Approach* - Implementing systems through a phased approach is preferred over a "big bang" implementation. We recommend either program-by-program implementation or phasing different lifecycle parts. Migrating all processes and data to the new system in one "big bang" introduces complexity, dependencies, and risk that can cause an implementation to fail.
- *Concurrent Financial Management (FM) System Interfacing* – In the current financial systems environment, integrating an AMS with a financial system interface is a major technical challenge requiring high levels of testing and security controls. Doing so concurrently with implementation of a new AMS creates significant barriers to achieving initial operation. Implementations are smoother and more likely to meet deadlines when agencies implement the award

management module first and integrate the financial system once the award management module is stable.

Pricing and Important Considerations for Proposal Development

There are three main pricing areas for an AMS: 1) License/Software Access, 2) Configuration and Implementation, and 3) Post-Implementation Services and Support.

Grants QSMO has previously seen vendors ask the following questions to provide more accurate estimates in their RFP/RFQ responses, and thinking about these questions may also help you in your planning efforts not to overlook important factors. These questions may not apply to all agencies and should be tailored to your specific needs.

License/Software Access

- **System Users and Security**
    - How many internal users, including C-Suite and IT department, need password access to the AMS?
    - How many external (portal) users need access to the AMS?

Configuration and Implementation

- **Implementation and Transition**
    - What is the planned go-live date for the new AMS?
    - Will the old and new AMS need to coexist? If so, for how long and will they need to exchange data?
    - Does historical grant data need to be loaded into the new AMS? If so, how many years and from how many sources?
    - How long should data be retained in the new AMS?
    - What is the current AMS system, and what are its pain points?
- **Grant Programs and Data Requirements**
    - How many grant programs exist, and how many will the new system support? Will this change in three years?
    - Can you provide a list of the programs, their types (e.g., discretionary), review types, and funding?
    - What is the combined annual budget for all grant programs?
    - Will all grant programs be included in the new AMS?
    - List the current data technology environments storing grants information (brand name and version if possible).
- **Integration and Performance**
    - Is there a finance system that the AMS must interact with? If yes, provide details about the data and system.
    - Are there other external systems that require integration?

- o What is your current grant lifecycle? Can you provide a process or workflow?
- o How do you measure grant performance?

Post Implementation Services and Support

- Do you require a help desk function? If yes, what is the hourly coverage and level of support needed?
- Do you require post-Authority to Operate (ATO) configuration services to help the AMS evolve in response to ongoing customer needs and new grant programs?

For more on contract considerations and procurement innovations, contact the Department of Homeland Security's [Procurement Innovation Lab (PIL)](#).

Phased Selection Approach

Whether you use Grants QSMO resources or conduct your own market research, consider a two-phased down-select if you expect many offerors. This process reduces responses, documentation, and protests. We advise using the market research priorities the Grants QSMO outlined in our [2024 RFI](#) section *4.1 Market Research Priorities* as a starting place for developing evaluation criteria.

> **Phase 1**: Review technical responses using Grants QSMO market research priorities, then conduct the first down-select.

> **Phase 2**: Conduct a live demo of remaining solutions aligned with specific FIBF use cases.

For more details on the down-select process, see the [PIL Boot Camp Workbook](#).

Leverage Grants QSMO Resources for Successful Solicitations

You do not need to start from scratch translating your requirements into acquisition documents. The Grants QSMO offers sample documents from other federal awarding agencies via [Acquisition Gateway](#) (Resources and Templates → Commercial Acquisitions Resources) to help you construct your solicitation. These resources include actual RFPs and Performance Work Statements (PWSs) from various agencies and our Solicitation Checklist you can use as a framework for your own documents.

Additionally, the Grants QSMO's partners have found the [PIL](#) to be an invaluable resource for acquisition techniques, lessons learned, and best practices.

Submit Documents to Grants QSMO for Review

Before publishing your grants IT solicitation, share your documents (e.g., PWS, RFP, RFI, etc.) with the Grants QSMO team. We will use the Solicitation Checklist to review your solicitation for FIBF standards, system integrations, and potential red flags to help you ensure your solicitation will meet all your needs and comply with technical requirements.

Select and Award Your Contract

Prepare Your Technical Evaluation Team

After the release of your agency's solicitation, the next step is to evaluate responses. Ensure you have a strong, committed team for this task. Start with recommendations from your CO. Train your evaluation team to identify and document the strengths, weaknesses, benefits, and impact of each proposal.

Grants QSMO Assistance with the Technical Evaluation Panel

Whenever appropriate and feasible, a Grants QSMO team member can participate in the technical review as an adviser to your Technical Evaluation Panel. To maintain objectivity, they can provide technical questions to aid the panel's evaluation but will not vote on solicited solutions. The Grants QSMO will sign a Non-Disclosure Agreement (NDA) to facilitate data and knowledge sharing.

Post-Award

Once you have awarded a contract, please provide copies of your contract documents to the Grants QSMO. Reviewing these documents from various agencies helps us improve our services.

To minimize protest risk, proactively engage all vendors to debrief their proposals and answer their questions, using documents from thoroughly completed evaluations.

During the implementation process, the Grants QSMO will conduct regular check-ins to monitor progress and provide support. It is important to provide regular project updates through working sessions, emails, phone calls, etc. This includes sharing challenges, issues, or unique business needs. Additionally, offer feedback on Grants QSMO IT system modernization tools and approach, including:

- Usefulness and ease of solution alignment to the FIBF GRM and grants data standards
- Usefulness of resources available on the Grants QSMO Acquisition Gateway webpage

We recommend leveraging GSA's [M3 Playbook](#), specifically [Phase 4: Migration](#), which details objectives, key activities, and outcomes for system or service modernizations and migrations.

Engaging with the Grants QSMO and using the resources outlined in the *Agency Acquisition Guide* is essential to strengthening cross-government connections, sharing best practices, and building on feedback and lessons learned from agency grants IT investments. We look forward to assisting your agency with an efficient and successful acquisition!

Appendix

Resources Referenced in this Document

Grants QSMO Resources

- **Acquisition Gateway**
  - The Grants QSMO page on Acquisition Gateway is the main repository for Grants QSMO resources directed toward commercial acquisitions for agencies. Some resources are available publicly, but most require users to sign in using their Login.gov credentials.
- **Buying Insights**
  - Available on Acquisition Gateway after sign-in. Located in the "Federal Shared Services (Marketplace)" section of the Grants QMSO's Acquisition Gateway page.
  - Provides detailed information about Grants QSMO Marketplace Shared Services
- **Catalog of Market Research**
  - Available on Acquisition Gateway after sign-in. Located in the "Commercial Award Management IT Vendors" section of the Grants QMSO's Acquisition Gateway page.
  - Excel workbook with extensive details about vendors offering Award Management Systems. Vendors detailed in the catalog were selected by a cross-government review team through the Grants QSMO's 2024 RFI process. The catalog is updated quarterly to keep vendor information current.
- **Catalog of Market Research: Vendor Highlights**
  - PDF version of the Catalog of Market Research with only high-level details about the catalog vendors. Available publicly via Acquisition Gateway (no sign-in needed).
- **Data Standards**
  - Grants.gov Finalized Data Standards and Guidance for Grants is the repository for an ongoing effort to define and implement technical data standards for grants management, in accordance with the GREAT Act. Adhering to the data standards and committing to future data standards is a core requirement of any new grants management system contract.
- **Federal Integrated Business Framework for Grants Management (FIBF GRM)**

- o Provides a model to coordinate and document business needs across the federal government. Defines the grants business lifecycle, provides business use cases, and more.
- **Grants QSMO [Marketplace](#)**
  - o Contains information about shared service providers validated by the Grants QSMO. Services contracted through the Grants QSMO Marketplace do not require commercial solicitations. They are contracted via an Interagency Agreement with the provider agency.
- **[Grants QSMO Request for Information](#)**
  - o [Requirements Document](#) – Text of the 2024 RFI Grants QSMO used to identify and ultimately select vendors for the Catalog of Market Research
- **[Investment Action Plan](#)**
  - o Agencies requesting funds for a grants IT investment are required to complete the Investment Action Plan / Investment Details questionnaire. This document will help you start digging into the investment planning process and is the basis for Grants QSMO's recommendation to OMB and GSA regarding your investment.
- **Past Performance Evaluation Questionnaire**
  - o Available on [Acquisition Gateway](#) after sign-in. Located in the "Commercial Award Management IT Vendors" section of the Grants QMSO's Acquisition Gateway page.
  - o Document template for collecting vendor past performance information as part of a solicitation.
- **Sample Solicitation Documents**
  - o Available on [Acquisition Gateway](#) after sign-in. Located in the "Resources and Templates" section of the Grants QMSO's Acquisition Gateway page.
  - o Other agencies' Requests for Proposals, Requests for Quotes, Requests for Information (RFPs, RFQs, RFIs) are available to use as templates for building your solicitation documents.
- **Solicitation Checklist and One-Pager**
  - o Available on [Acquisition Gateway](#) after sign-in. Located in the "Commercial Award Management IT Vendors" section of the Grants QMSO's Acquisition Gateway page.
  - o Details certain elements of a solicitation that are required, recommended, and for consideration. Includes sample language to leverage in solicitation preparation. The checklist is the foundation Grants QSMO uses when reviewing an agency's RFP.
- **Value Insights**

- Available on Acquisition Gateway after sign-in. Located in the "Federal Shared Services (Marketplace)" section of the Grants QMSO's Acquisition Gateway page.
- Provides detailed information about Grants QSMO Marketplace Shared Services.
- **Vendor Library**
  - Available on Acquisition Gateway after sign-in. Located in the "Commercial Award Management IT Vendors" section of the Grants QMSO's Acquisition Gateway page.
  - Contains information about all 42 vendors who responded to the Grants QSMO's 2024 RFI.

External Resources

- **8(a) STARS III**
  - *"The 8(a) STARS III GWAC is a small business set-aside contract that provides flexible access to IT services and customized IT services-based solutions from a large, diverse pool of 8(a) industry partners."*
- **Alliant 2**
  - *"Alliant 2 GWAC is a multiple-award, indefinite delivery, indefinite-quantity Governmentwide Acquisition Contract offering complete and flexible IT solutions worldwide."*
- **Federal Acquisition Regulation**

  - FAR 8.405-2 allows you to leverage a select vendor pool for your solicitation, such as the Catalog of Market Research vendors, reducing the number of proposals you will receive and streamlining your acquisition of a Catalog of Market Research solution.

  - *FAR 16.505 Orders issued under GWACs follow FAR 16.505 procedures.*

- **General Services Agency (GSA) GSA Multiple Award Schedule (MAS) and GSA MAS Ordering Guide**

  - GSA carries out the MAS program, also called schedules for Federal Supply Schedule, where federal, state, local, tribal governments, and other eligible buyers get commercial products, services, and other solutions at good prices.

  - As of 2024, all the vendors in the Grants QSMO Catalog of Market Research sell their products and services via the MAS.

- **M3 Playbook (General Services Administration)**

- - *"The Modernization and Migration (M3) Framework is the roadmap for agencies "buying a service" - delivering projects on time, on budget, and on value. The M3 framework is designed to help Chief Financial Officers (CFO) Act agencies achieve successful outcomes and reduce risk during administrative system and/or service modernizations and migrations. The M3 Framework is a six-phased approach to system and service modernizations and migrations including objectives, key activities and outcomes for each phase. Within each phase, there are associated activities grouped across four workstreams: (1) Program Management, (2) Workforce, Organization and Stakeholders, (3) Technology, (4) Process and Service Delivery."*
- **Procurement Innovation Library (Department of Homeland Security)**
  - *"The Procurement Information Lab (PIL) is a DHS framework aimed at experimenting with innovative acquisition techniques across the DHS enterprise. The PIL provides a safe space to test new ideas, share lessons learned, and promote best practices. It fosters cultural changes that promote innovation and managed risk-taking through a continuous feedback cycle. Here you will find innovation resources, including the PIL Yearbook and PIL Boot Camp workbook."*