



REQUEST FOR PROPOSALS (RFP)

RMI 1000 – RFP for ERP applications and implementation services

SUMMARY OF PROCUREMENT

RMI would like to procure software solutions and implementation services that span ERP applications of accounting and finance, grant, and project management, and HCM. We are seeking live demonstrations of functionality and UX before procuring.

The procured software and implemented solution must support our transformation to a larger and more connected enterprise, be streamlined and scalable. Preference will be given to a single software platform offering strong preset integrations. We are open to a multiple module solution with equally strong integrations.

About RMI

RMI decarbonizes energy systems through rapid, market-based change in the world's most critical geographies to align with a 1.5°C future and address the climate crisis. We work with businesses, policymakers, communities, and other organizations to identify and scale energy system interventions that will cut greenhouse gas emissions at least 50% by 2030.

For nearly 40 years, RMI has utilized our unique techno-economic expertise and whole-systems thinking to both publish groundbreaking research and analysis. We bring together collaborations of rare reach, range, and expertise—creating unconventional partnerships and mobilizing action to drive change on the massive scale needed to combat the climate crisis.

About RMI 1000 enterprise software mapping project

RMI expects to make a major impact in this decisive decade. This project exists to ensure that we can realign systems to support this position, using revolutionary changes where necessary over incremental improvement. This project is justified by the expected growth of RMI and complexity of our work moving forward.

Prior to the procurement phase of this project, in-depth analysis of current state and future needs was performed. A detailed listing of key process needs, and associated requirements are listed in this proposal and will be one of the ways we evaluate software offerings.

Current IT applications at RMI

The current IT applications landscape at RMI is:

- HR processes (including payroll) are predominately supported by SyncHR. Cornerstone supports performance management, compensation planning, and LMS. Culture Amp supports employee experience measurement and Kudos supports rewards and recognition.
- Accounting and Financial processes are predominately supported by NetSuite. Concur (expense, invoice, and travel) and Adaptive Insights (budgeting and reporting) are integrated and in use.



- Grant and project management as well as timesheets are predominately supported by Mavenlink.
- Monday.com is in use to support task management and workflows.
- Salesforce is in use supporting several Development processes and is integrated into several systems. RMI is not seeking to replace Salesforce, but integration with is important.
- RMI predominately operates in a Microsoft O365 environment and is not seeking change on that front.

SCOPE OF WORK AND OUTPUT/DELIVERABLES

The aim now is to evaluate software solutions against key requirements in critical business areas, choosing the best software fit for RMI based on requirement solution scores and user experience, procuring the software, and implementing the solution.

The scope of the work includes:

- Interactive software demonstrations of the software proposed supporting the following areas. The evaluation team will expect to be able to ask detailed questions based both upon the proposal response and the presentation.
 - core financials
 - grant and project portfolio management that includes people and time tracking management
 - HR, data and analytics, payroll, and time tracking management related to legal compliance
- References from other clients on software purchasing and implementation for evaluation (preference towards similar non-profits). RMI reserves the right to contact these references and discuss the client's level of satisfaction with the tenderer and its products.
- Implementation partners
 - tenderer may suggest and involve a preferred implementation partner as part of the proposal.
- Recommendation on implementation plan
 - Proposal on the optimal implementation sequence should be part of the plan. One analysis suggests it should be ERP and Grant & Project Management functionality, followed by HCM and payroll functionality.
- Implementation support proposal for decided upon software
- Integration support proposal between these different areas. If a naturally integrated single platform is offered, please demonstrate the integration live. Not all tenderers will be able to



provide software solutions covering all fronts. They are still encouraged to participate in the proposal and provide pertinent integrations examples wherever possible.

- Software activation and administrator / user onboarding recommendations (including training) and support Data migrations from RMI’s existing software into the new software
- Implementation and customization in partnership with RMI in a phased based approach
- Continued software support post launch

Output:

- Statement of interest that includes a description of how the requirements are met and preferred delivery times of free interactive demonstrations.
- Interactive software demonstration to team of 5-15 people.
- Proposed software solution and cost that supports core financials.
- Proposed software solution and cost that supports grant and project portfolio that supports people and time tracking management related to grants and projects
- Proposed software solution and cost that supports HCM, payroll, data and analytics, and time tracking management related to legal compliance.
- Proposed implementation and customization plan including suggested partner recommendation and cost.
- Proposed integration support solution including suggested partners and cost.
- Software testing, piloting, implementation, and customization.

OUTPUT/DELIVERABLES TIMELINE

<i>Deliverable number</i>	<i>Deliverable name</i>	<i>Milestone due dates</i>
1	<i>Software proposal and itemized subscription cost for 3- and 5-year terms including discounts.</i>	<i>January 12, 2022</i>
2	<i>Phased Software implementation and customization plan and itemized cost.</i>	<i>January 12, 2022</i>
3	<i>Interactive software demonstration addressing key processes and needs. Selected tenderers only.</i>	<i>From January 14 – January 28, 2022</i>
4	<i>Software implementation kickoff, activations, and phased onboarding.</i>	<i>February 11, 2022</i>
5	<i>Full software implementation, and customization</i>	<i>Tenderer to supply a proposed timeline</i>



Implementation Duration

The duration of the software piloting, testing, implementation, and customization phases will be defined based on collaboration between RMI and the chosen tenderer and their plan. RMI requires phase 1 implementation of the project by July 1, 2022.

BUDGET

The budget should include the cumulative software annual subscription cost (SaaS or Cloud) and the software implementation, customization, data migration, and integration. All tenderers must clearly state any assumptions and/or requirements relating to the above components as well as how payments must be made for software and/or services offered in their proposals.

RMI requests that NGOs specific discounts for both the software offering and implementation and customization services are considered in the proposal.

Expenses

The tenderer will bear the full cost of the interactive software demonstration(s), software proposal generation effort, written integration and implementation plan, and cost quotes. This includes any incurred expenses that relate.

Once a tenderer is selected and an agreement is in place to proceed to software implementation, the selected tenderer will be reimbursed up to a total of USD 5,000 for approved travel expenses, if incurred, because of this contract for participation in project meetings or engagements on the ground. All requests for reimbursement must be accompanied by original receipts and submitted on a timely basis, no later than 15 days of the end date of this agreement. Allowable expenses will be based on RMI Travel and Expense Policy.

GUIDELINES FOR PROPOSAL SUBMISSION

Requirements

The selected tenderer will be able to demonstrate capacity in similar work, support processes and needs areas. If a tenderer is only able to satisfy one part of the requirements as segmented below, RMI still invites a proposal that clearly outlines what can be achieved and what cannot be achieved.

- Process support for core financials, grant and project portfolio that includes people and time tracking management related to grants and projects:
 - General Ledger
 - Payroll
 - Accounts Payable



- Accounts Receivable
- Grant and Financial Reporting
- Billing and Invoices
- Grant Management
- Budgeting and Forecasting at Program and Grant level
- Forecasting
- Grant Report Management
- Technical Project Execution Support
- Time Tracking
- Project Management components including Project Auditing, Project Reporting, Project Planning, Project Monitoring, Project Close-Out
- Procurement and Vendor Management
- People Resource Management
- Other needs for core financials, grant and project portfolio that includes people and time tracking management related to grants and projects:
 - 20 administrator level access accounts are estimated
 - SaaS or cloud preferred. On-prem not preferred.
 - Software must have functionality to manage donations more than USD 10,000,000 and to handle international donors.
 - System supports the fee-for-service (FFS) and non-government organization (NGO) models in harmony together.
 - ERP, Grant, and Project Portfolio features - Can handle cross program grants and software will allow more than one client on a project; s software can support global efforts in Africa, India, Islands, Asia, SE Asia; Development and Fundraising department must have full visibility of grant (spend down, work completed, M&E etc.).
 - ERP, Grant, and Project Portfolio features - Project managers should have visibility on contract types and programs managers should have visibility on what invoices say when clients are invoiced; allow for client field updates mid-project; allow for most fields to be updated mid project; notifications/reminders of when projects, timesheets, and customizable fields are due.
 - Integration with pertinent HCM information related to ERP, time tracking and portfolio information (grant, program, initiative, project, tasks) in exists, or solution included?



- Grant management reporting ability – Report on time entries, actuals, project details (Name, owner, engagement type, % complete, etc.); track and record all costs to appropriate Grant, Project, Initiative and Task level; Ability to report on utilization and forecasted utilization; Notifications/reminders of when reports are due
- Clear expectations with the accounting system regarding how much should be spent on project.
- The system currently supports the FFS and NGO models. Any future improvements to the standard operating procedure must not prevent the continued support of both the FFS and NGO models together
- Availability to integrate with Salesforce data (Accounts, Vendors, Opportunities, products, items, budget, owners, grants), expenses and vendor info, timesheets, invoices, revenue/journal entries, financial reports.
- Financial department requires multiple funding sources and grant management admin access. Ability to set restrictions based on program or individual.
- Software is integration ready and compatible with most legacy task management formats and can import that data easily. Ensure that integration between Monday.com (API) and similar software down the road.
- Commitment to reliable and fast software support for ERP and Grant focus.
- Grant/Project management requirement - Ability to connect user entries with parameters such as cost rate, billable rate, be able to assign different contract types (admin, billable, etc.), Assign users job codes/roles, need to be able to assign billing codes, Automatic email reminders for timesheet statuses (customizable notifications preferred), Hybrid project management frameworks supported.
- Robust data and reporting options for project managers and department leaders
- Process support for core HCM, payroll, data and analytics, and time tracking management related to legal compliance:
 - New Hire Onboarding
 - Recruiting
 - Application Tracking
 - Benefits Administration
 - Compensation Planning
 - Learning Management System
 - Performance Management
 - Employee surveying



- Employee Rewards
- Retirement or Termination support
- Skill Tracking
- HR Data and Analytics
- Payroll (listed again as the solution must be well integrated)
- Other needs for core HCM, payroll, data and analytics, and time tracking management related to legal compliance:
 - 10 administrator level access accounts are estimated
 - Global payroll supported in Nigeria and Ethiopia, or payroll partner plan included
 - Software can store records on 500-2000 full and part time staff, contractors, Professional Employer Organization (PEO) type employees, subsidiary employees, and other common types.
 - Software can store record of 500-2000 global employees including USA, China, India, European countries, Nigeria, Ethiopia, SE Asian countries.
 - Integration with ERP, time, and portfolio information (grant, program, initiative, project, tasks) in ERP and Grant/Project exists, or solution included?
 - HCM access available internationally, international benefits is a plus.
 - Ability to track recruitment applications. Ability to track new hire training.
 - Employee health, safety and safe location information can be supported
 - Learning and Development application can support 500-1750 employees
 - Numeric rating system for performance reviews, Intuitive compensation data
 - Software can support different languages and commit to continued support in next 5 years.
 - Functionality to ensure that timesheets do not become disaggregated from Grant management and financials with an HCM only solution.
 - HRIS integrated support with the system
 - Ability to easily create and run custom reports for HCM information and real time updates in the system.



The selected tenderer will also communicate an implementation plan in writing that includes the various phases (testing, piloting, implementation, customization), resource and time commitments associated with this resource intensive project.

Proposal Content

Tenderers should submit:

- Tenderer’s official name, address, and contact information
- Name, position, address, and contact information of person who is authorized to make decisions or represent the tenderer
- Type of entity
- A CV or CVs of core team, including demonstration and implementation phases
- Examples of and references for similar work
- An initial outline of proposed individual/team involved
- Budget broken down by cost category to support financial proposal
- A statement of interest that includes a description of how the above requirements are met
- Software proposal plan
- Software implementation and customization plan that covers complete data migration by July 1

Proposals, including all supporting documents, should be written in English and financial information should be provided in USD. Supporting documents may be in another language, provided they are accompanied by an accurate translation of the relevant passages in English.

RMI is aware that information contained in a proposal may indicate a tenderer’s current operations and may be confidential. Therefore, RMI requests that any confidential information in a proposal be clearly identified as such and RMI will treat it as confidential.

All materials submitted with a proposal become property of RMI. RMI will have the right to use all ideas or adaptations of the ideas contained in the proposals received subject to clearly identified confidential or proprietary limitations. Disqualification of any proposal does not restrict or eliminate this right.

INSTRUCTIONS TO TENDERERS

RFP Process & Timeline

Stage of Procurement	Date, Time, Time zone
RFP released	<i>December 21, 2021</i>
Deadline for questions	<i>January 7, 2022</i>
Tenderer Briefing	<i>January 10, 2022. 1:00-2:00 MST</i>
Questions answered by RMI	<i>January 11, 2022</i>
Full proposal submission deadline	<i>January 12, 2022</i>
Stage gate – invitation to demo by RMI	<i>January 13, 2022</i>
Demos with selected tenderers	<i>January 14 – 28, 2022</i>



Final tenderer selection	February 4, 2022
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All questions about this RFP must be received via electronic mail to the contact below. Answers to the questions will be shared with all parties who have asked questions or otherwise expressed interest.

All proposals must be sent via electronic mail to the same contact listed below by *January 12, 2022*.

Kevin Gauthier / Technical Project Manager and Procurement Lead / KGauthier@RMI.org

Suzanne Hopkins / Sr. Director / SHopkins@rmi.org

When sending questions or submitting a proposal please use this electronic mail subject: *[RMI 1000 RFP <tenderer name> <brief description>]*

Please note that it is the tenderer's responsibility to ensure that the proposal and all other required documents are received by the closing date at the email address specified above. Proposals received after the time and date specified will not be reviewed or considered. Failure to provide any information requested in this RFP may result in rejection for non-responsiveness.

Tenderer briefing

RMI invites prospective tenderers to attend an optional briefing to be held on January 10, 2022, at 1:00pm MST by virtual Zoom conference, and the joining details for this meeting are <https://rmi-org.zoom.us/j/96856893145?from=addon>

All tenderers are invited to this joint briefing and attendance is optional. This will be the opportunity to understand details of the RFP and demo expectations in greater detail as we will not be doing individual tenderer calls.

Interactive Demonstration format

Interactive demonstrations will be held with individual tenderers (not jointly) by virtual Zoom conference between the hours 8:30pm – 12:30pm MST from January 14, 2022, and January 28, 2022. Details will be sent in writing after the demo stage gate section phase on January 13, 2022.

Interactive demonstration for the HCM, data and analytics, payroll, and time tracking management piece, administered by the tenderer, is limited to 2-3 hours. Interactive demonstration for the core financials and grant and project portfolio, administered by the tenderer, is limited to 3-4 hours. Tenderers are invited to provide their preference of up to 2 slots for a full platform solution. Tenderers are invited to request certain dates at any time on or before January 12, 2022.

EVALUATION AND SELECTION

Evaluation Criteria

Pre-Demo:



Demo stage gate selection criteria:

The Procurement Lead will open all tenderer proposals received by the proposal deadline and conduct minimum requirements review of the following metrics. Proposals that have achieved the minimum requirements will move forward in the evaluation process and be shared with the Procurement Evaluation Committee. RMI will invite each tenderer whose response passes to present in writing. The Tenders not meeting minimum requirements will be informed in writing by the Procurement Lead.

Evaluation Metric	Weight
Software meets requirements	70%
Price; the cost of purchasing, implementing, operating, and maintaining the software	20%
Experience with similar projects	10%

Demo and Full Evaluation:

Formal criteria of final selection after demo stage gate:

- Experience with similar projects
- Rating of interactive demonstration of software solutions against requirements
- The extent to which the proposal fulfills RMI's stated requirements as set out in the RFP
- Completion of all requirements
- Company and technical due diligence review

Technical criteria of final selection after demo stage gate:

- Technical proposals will be evaluated for all proposals that have met the minimum requirements.
- Experience with similar projects and references
- Qualifications and available capacity of tenderer

Financial criteria of final selection after demo stage gate:

- Financial proposals will be evaluated after technical proposals have been evaluated.
- Price; the cost of purchasing, implementing, operating, and maintaining the software
- Terms of payment and guarantees in respect to the subject matter

Selection Process

No proposal development costs shall be charged to RMI. All expenses are to be borne by the tenderers. RMI may award to the tenderer offering best value without discussions. However, RMI reserves the right to seek tenderer clarifications and to negotiate with those tenderers deemed to be within a competitive range.



RMI may, at its discretion and without explanation to the prospective tenderers, choose to discontinue this RFP without obligation to such prospective tenderers or make multiple awards under this RFP. Procurement contracts will not be awarded to tenderers debarred by the U.S. government or named on restricted parties lists. Any proposal may be rejected in whole or in part for good cause when in the best interests of RMI.

A proposal will be selected based on the evaluation of the RFP response, the interview results, any necessary vetting and due diligence, and the satisfactory outcome of financial negotiations. After the selected tenderer and RMI have entered into a contract for goods/services, RMI will notify the unsuccessful tenderers.

Any Tenderer who wishes to ascertain the grounds on which its proposal was not selected, should request explanation. The RMI procurement contact shall promptly provide in writing an explanation of why such proposal was not selected. Please note, if a tenderer requests a debriefing meeting, the Tenderer shall bear all their costs of attending such a debriefing meeting and the hourly rates of the RMI staff required for the meeting if significant expenses are incurred by RMI.

CONFIDENTIALITY AND LEGAL STATEMENTS

Confidentiality Agreement

This document and the information contained within it are for tenderer use only, for the purposes of preparing a response to this RFP. It is not to be duplicated, distributed, or have its information disclosed to any third party without RMI's written permission.

Use of Information

Subject to litigation or other legal disclosure and/or audit requirements, RMI will not disclose information submitted in response to an RFP.

Official Representation

Required legal documentation is to be signed by officers of the tenderer verifying that statements made in the response to the RFP are official representations of the tenderer.

Vendors and Tenderers to Inform themselves

Tenderers are responsible for ensuring they have sufficiently understood the contents of this RFP and any further information shared during briefings.