REQUEST FOR PROPOSALS (RFP)

Workday Implementation Services RFP

SUMMARY OF PROCUREMENT

RMI is evaluating software partners for ERP and HCM functions. If Workday is chosen, we want to understand implementation partner options with proven nonprofit experience to deliver on this objective.

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 it 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 scope of the work includes:

- A deployment that includes:

  - A written plan covering the planning phase and related efforts for the deployment.

  - An architect or design and configuration phase and related efforts for the deployment.

  - A testing phase and related efforts for the deployment.

  - A user deployment phase and related efforts.

  - A plan to train the appropriate number of software users in the Workday software.

  - A separate change management plan for the deployment.

  - Complete knowledge transfer to the RMI team prior to the end of the engagement.

- A plan to train the appropriate number of software administrations in the Workday software. The "Workday software" includes the ERP, Grant, Project, FP&A, and HR functions unless explicitly stated.

- The proposal should include a start-to-end deployment solution without process gaps, such as data migration. If a partner will be used for data migration, please incorporate that with your proposal. The plan should limit the costs associated with travel.

- References from other clients on software deployments for evaluation (strong 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.

- Recommendation on business process workflow approaches that leverage the functions of the new software.

- Recommendation on order of implementation plan

  - Proposal on the optimal implementation sequence should be part of the plan.

- Continuing support after deployment can be included in the plan, however it must be itemized separately from cost and timeframe.

- Output:

  - Proposed deployment plan and cost that includes software testing, piloting, implementation, and customization.

    o   Software deployment

OUTPUT/DELIVERABLES TIMELINE

Deliverable number	Deliverable name	Milestone due dates
1	Implementation planning starts	March 2022
2	Go-Live US Payroll	January 1, 2023
3	Go-Live: ERP and Grant functions	By calendar year Q4 2022
4	Go-Live: HCM	Late Spring, 2023

Implementation Duration

The duration of the implementation should be no longer than 12 months. RMI requires Payroll go-live by January 1, 2023.

BUDGET

The proposal budget should include the cumulative cost of the training, planning, design and configuration, testing, deployment, and change management.

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 NGO-specific discounts for implementation are considered in the proposal.

Expenses

The tenderer will bear the full cost proposal preparation and related work. This includes any related incurred expenses.

GUIDELINES FOR PROPOSAL SUBMISSION

Requirements

Requirements for participation and proposal submission: The tenderer must be a recognized Workday Service Partner and their company must be listed on Workday's website as such, in the service partner list. In addition to this, the tenderer must have experience in the North American medium enterprise field, experienced in nonprofit deployment in the space that RMI operates, and be able to show five or more years' experience in complete end to end deployments.

Requirements for proposal review by RMI: The tenderer must satisfy the above requirements and show end to end deployment proposals covering training, planning, design and configuration, testing, deployment, and change management.

Deployment parameters:

- RMI numbers
  - HCM - Employee locations. 432 US based. 55 International.
  - HCM Employee projections in 3 years: 1000 - 1250 US employees
  - HCM Benefit providers - a. Cigna b. MetLife c. VSP d. New York Life e. Alerus FSA/HSA f. Alerus COBRA g. Principal 403(b)
  - HCM Non-Benefit providers - a. Kudos b. Culture Amp c. Cornerstone
  - HCM Payroll - Implement US payroll only. US Payroll state information below.
  - HCM other - 2 FEINs. ~125 current contractors.
- Key integrations
  - Active Directory
  - SSO
  - E-Verify
  - Benefit Providers
  - Payroll Post-Processing
  - Salesforce
  - External Journal Activity
  - Banks
  - Business Documents Outbound
  - Microsoft Suite where applicable
  - Concur
  - Cornerstone
- Implementation time boundaries
  - HCM implementation starts: May 2022
  - Payroll go-live: Jan 1, 2023 [Required]
  - HCM implementation completes: CY H1 2023
  - ERP implementation starts: March 2022
  - ERP implementation completes: Calendar year (CY) Q4 2022
- Required Implementation phases
  - Implementation Plan
    - Including training
    - Including Change Management
  - Design and Configure
  - Test
  - Deploy
- Required software functions deployed

- **People**
  - Core Human Capital Management - LDP
  - Benefits - LDP
  - Cloud Connect for Benefits - LDP
  - Payroll for United States - LDP
  - Cloud Connect for Third Party Payroll - LDP
  - Advanced Compensation Management - LDP
  - Time Tracking - LDP
  - Absence Management - LDP
  - Learning - LDP
  - Media Cloud - No Fee
  - Cloud Connect for Learning - LDP
  - Recruiting - LDP
  - Talent Optimization - LDP
  - Help - LDP
  - Journeys - LDP
  - We would not need to deploy Peakon Employee Voice – LDP
- **Finances**
  - Core Financials - LDP
  - Revenue Management - LDP
  - Grants Management - LDP
  - Procurement - LDP
  - We would not need to deploy Expenses – LDP
  - Financial Planning – LDP
- **Projects**
  - Projects - LDP
  - Project Billing – LDP
- **Analytics**
  - People Analytics - LDP
  - Prism Analytics – LDP
- **Sourcing**
  - Strategic Sourcing Expert - LDP package, including the following:
  - Strategic Sourcing Essentials - LDP
  - Strategic Sourcing Intake - LDP
  - Strategic Sourcing Contracts - LDP
  - Strategic Sourcing Supplier Management – LDP

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
- Examples of and references for similar work
- An initial outline of proposed individual/team involved
- Budget broken down by cost category or logical activity grouping

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 (MST)
RFP released	February 25, 2022
Deadline for questions	March 18, 2022
Questions answered by RMI	March 21, 2022
Full proposal submission deadline	March 23, 2022
Interviews – Requested as needed by RMI only.	February 28 onwards
Final tenderer selection	From March 25, 2022

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 *March 23, 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: *[Workday Implementation Services 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.

Interviews

Private interviews with prospective tenderers may be requested by RMI during the RFP timeline if the proposal warrants further discussion. RMI asks that tenderers be reasonably available for these types of requests, and we invite tenderers to send over preferred dates/times when they submit their proposals.

EVALUATION AND SELECTION

Evaluation Criteria

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 implementing with NGO pricing considered
- 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.