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# Request for Proposal

## Enterprise Resource Planning (ERP) Consultant

Issue Date: 1/22/2021

Closing date and time: 2/5/2021 - 23:59 hrs. Eastern Daylight Time (EDT)

Request For Proposal (RFP) ID: "ERP Consultant 1/22/2021"



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### 1. INTRODUCTION TO HIAS

HIAS is a nonprofit organization incorporated in New York State and headquartered in Silver Spring, Maryland, and is exempt from federal income tax under Internal Revenue Code Section 501(c)(3). HIAS advocates for the protection of refugees and assures that displaced people are treated with the dignity they deserve. Guided by our Jewish values and history, HIAS brings more than 130 years of expertise to our work with refugees.

### 2. REQUIREMENTS

HIAS invites qualified goods/service providers (referred to herein as “Applicants”) to make a firm offer for the provision of **Enterprise Resource Planning (ERP) Consulting Services**.

**HIAS seeks to establish a contract for the provision of ERP Consulting Services to assist HIAS in the selection of a new ERP system and/or equivalent. The planned scope of work is detailed in Annex IV Technical Specifications. The Applicant shall detail how each activity will be executed and the estimated timeframe for completion.**

The Applicants are therefore requested to quote under this RFP a total price along with a detailed breakdown of the pricing structure for the completion of services contained in Annex IV Technical Specifications. Upon signing of the contract, the quoted prices shall be binding on the goods/service providers (herein referred to “Contractor”) for the duration of the contract. The quoted price will be accepted by both HIAS and the Contractor until expiration or termination of the contract.

### 3. ACKNOWLEDGMENT

HIAS would appreciate you informing us of the receipt of this RFP by return e-mail to [procureinquiry@hias.org](mailto:procureinquiry@hias.org) as to:

- a) Your confirmation of receipt of this RFP and
- b) Whether or not you will be submitting a Proposal

Please include the RFP ID, located at the top of this document, in the Subject line.

### 4. PREPARATION OF PROPOSALS

- a. Documents Comprising the Proposal **to be Submitted**:
  - (i) Proposal Submission form (Annex V)
  - (ii) Price Schedule (Annex VI)
  - (iii) Technical Details: detailed description of the essential technical and performance characteristics of the goods/services
  - (iv) Customer References: at least two references from prior customers for which similar goods/services to those contained in this RFP were provided
- b. Demonstration: If provided in the Proposal Data Sheet, HIAS shall require Applicants to provide a live demonstration of the proposed goods/solution. The applicant shall



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provide the demonstration free of charge and HIAS shall not accept any liability for any damage to or loss of Applicants' property in connection with such a demonstration.

5. REQUESTS FOR CLARIFICATION

Applicants are required to submit any request for clarification or any question in respect of this RFP by e-mail to [procureinquiry@hias.org](mailto:procureinquiry@hias.org). Please include the RFP ID in the Subject line. The deadline for receipt of questions for any clarifications is **23:59 hrs. EDT time on 1/28/2021**. Applicants are requested to keep all questions concise. Responses will be posted on <https://www.hias.org/requests-proposals>

6. PROPOSAL SUBMISSION DEADLINE

Proposals must be delivered to the email address and on or before the time and date specified in the Proposal Data Sheet (Annex I). **Late Proposals shall be rejected.**

7. DISCLAIMER

This RFP is not to be construed in any way as an offer to contract with your organization.

Sincerely,

*Theron Jurkowski* 1/22/2021

Contracting Manager

### Annex I: PROPOSAL DATA SHEET

The following specific data for the goods to be procured shall complement, supplement or amend the provisions in the General Instructions to Applicants. Whenever there is a conflict, the provisions herein shall prevail over those in the General Instructions to Applicants.

Relevant clause(s) of Instruction to Applicants	Specific data complementing, supplementing, or amending instructions to Applicants
Language of the Proposal	English
Proposal Price Currency	USD
Evaluation Criteria	Best Value for the services rendered
Documents Establishing Applicant's Eligibility & Qualifications	<input type="checkbox"/> Required <input checked="" type="checkbox"/> Not required.
Proposal Validity Period	120 days after the Deadline for Submission of Proposals
Demonstration	<input checked="" type="checkbox"/> Required <input type="checkbox"/> Not Required.
Deadline for Requests for Clarification	1/28/2021 - 23:59 hrs. Eastern Daylight Time (EDT)
Deadline for Submission of Proposals	2/5/2021 - 23:59 hrs. (EDT)
Electronic Submission of Proposals	<input checked="" type="checkbox"/> Allowed <input type="checkbox"/> Not allowed
Email Address for Submission	<a href="mailto:procureinquiry@hias.org">procureinquiry@hias.org</a>
Preliminary Examination — Completeness of Proposal.	<input type="checkbox"/> Partial Proposals permitted. <input checked="" type="checkbox"/> Partial Proposals not permitted.
Documents to be Submitted	(i) Proposal Submission form (Annex V) (ii) Price Schedule (Annex VI) (iii) Technical Details (iv) Customer References: at least two
<b>Additional Requirement</b>	
Required Start Date for Performance	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes_ Month and Year

**Award Methodology:** HIAS shall award the contract to the Applicant based on **Best Value:**

Evaluation Methodology Factors	Weighting
1.1 Cost – Life cost of the services.	20%
1.2 Quality - Degree to which the consulting services meet or exceed the requirements based on proposed specifications, experience and fit.	30%
1.3 Risk – Level of risk and methods for mitigation.	5%
1.4 Sustainability - Economic, environmental, and social benefits in support of the project objectives; may include the flexibility of the Proposal to adapt to possible changes over the life cycle.	35%



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1.5	Innovation - Innovation in the design and/or delivery; solutions that exceed the requirements or alternative solutions that could deliver best value.	10%
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## Annex II: GENERAL INSTRUCTIONS TO APPLICANTS

### A. Introduction

1. General: HIAS invites Proposals for the supply of goods or services.
2. Eligible Applicants: Applicants must not be associated, or have been associated in the past, directly or indirectly, with a firm or any of its affiliates that have been engaged by HIAS to provide consulting services for the preparation of the design specifications or other documents to be used for the procurement of goods/services to be purchased under this RFP.
3. Cost of Proposal: The Applicant shall bear all costs associated with the preparation and submission of the Proposal and HIAS will not be responsible or liable for those costs, regardless of the conduct or outcome of the RFP.

### B. RFP Documents

1. Examination of RFP Documents: The Applicant is expected to examine all instructions, forms, terms and specifications contained in the RFP Documents. Failure to comply with these documents will be at the Applicant's risk and may affect the evaluation of the Proposal.
2. Clarification of RFP Documents: A prospective Applicant requiring any clarification of the RFP Documents may notify HIAS in writing. The response will be made in writing to any request for clarification of the RFP Documents that it receives earlier than one week before the Deadline for the Submission of Proposals. Written copies of the response (including an explanation of the query but without identifying the source of inquiry) will be sent to all prospective Applicants that have responded to the RFP Documents.
3. Amendments of RFP Documents: HIAS may, for any reason, amend the RFP Documents, whether at its initiative or in response to a clarification requested by a prospective Applicant. All prospective Applicants that have received or acknowledged receipt of the RFP Documents will be notified in writing of any amendments. To afford prospective Applicants reasonable time in which to take the amendments into account in preparing their Proposals, HIAS may, at its discretion, extend the Deadline for the Submission of Proposals.

### C. Submission of Proposals

1. Procurement Ethics: It is HIAS's policy that Applicants/Suppliers observe the highest standard of ethics during the procurement process and execution of such contracts. HIAS shall reject a Proposal if it determines that the Applicant, or any of its personnel, agents, consultants, subcontractors or goods/service providers, has, directly or indirectly, engaged in corrupt, fraudulent, collusive, coercive or obstructive practices in competing for the contract in question. HIAS may also declare the Applicant ineligible for participation in future procurement and award of contracts, either indefinitely or for a stated period. An Applicant/Supplier who offers any gift of any value to HIAS staff will be considered to be



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influencing the procurement process. HIAS shall reject a Proposal if it determines that any such gift has been offered.

2. Suspension and Debarment: HIAS will not make purchases or obtain services from people or companies on suspension, debarment, or other sanctions and watch lists, including, but not limited to:

- The U.S. System for Award Management (SAM);
- The U.S. Treasury Office of Foreign Asset Control (OFAC);
- The UN Consolidated Sanctions List;
- The World Bank Listing of Ineligible Firms & Individuals;
- European Union Sanctions List.

A suspension and debarment check will be performed at the time of proposal and then again at the time of contract preparation.

3. Conflict of Interest: An Applicant shall not have a conflict of interest that could call into question its participation in the procurement process and award of contract. Applicants shall disclose any potential or actual conflict of interest at the time of Proposal and during the execution of any contract. All Applicants found to have a conflict of interest may be disqualified.
4. Joint Venture: Where a joint venture or any other form of partnership (together, JV) approach is proposed, Applicants are required to provide full details of the JV and nature of the relationship with other members.

Applicants forming a JV shall nominate an authorized representative of the JV (duly evidenced by submitting a power of attorney signed by a legally authorized representative of the JV) who shall have the authority to conduct all business for and on behalf of all members and enter into the contract.

5. Modification and Withdrawal of Proposals: The Applicant may withdraw its Proposal after submission, provided that written notice of the withdrawal is received by the HIAS before the deadline for submission. No Proposal may be modified after passing of the Deadline for Submission of Proposals. No Proposal may be withdrawn in the interval between the Deadline for Submission of Proposals and the expiration of the Period of Proposal Validity indicated in the Proposal Data Sheet.

#### D. Evaluation of Proposals

1. Preliminary Examination:
  - (a) Before the detailed evaluation, HIAS will determine the substantial responsiveness of each Proposal to the RFP. A substantially responsive Proposal is one that conforms to all the terms and conditions of the RFP without material deviations.





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- (b) HIAS will examine the Proposals to determine whether they are complete, whether any computational errors have been made, whether the documents have been properly signed, and whether the Proposals are generally in order.
  - (c) Arithmetical errors will be rectified on the following basis: If there is a discrepancy between the unit price and the total price that is obtained by multiplying the unit price and quantity, the unit price shall prevail and the total price shall be corrected. If the concerned Applicant does not accept the correction of errors, its Proposal will be rejected. If there is a discrepancy between words and figures, the amount in words will prevail.
  - (d) A Proposal determined as not substantially responsive will be rejected by HIAS and may not subsequently be made responsive by the Applicant by correction of the non-conformity.
2. Award Methodology
- a. See **ANNEX I: PROPOSAL DATA SHEET**

#### E. Award of Contract

- 1. HIAS reserves the right to accept or reject any Proposal, to annul the RFP process and reject all Proposals at any time before award of contract, without thereby incurring any liability to the affected Applicant(s) or any obligation to provide justification.



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### Annex III: General Terms and Condition

Please find the General Terms and Conditions as a separate file along with this RFP file at:

<https://www.hias.org/requests-proposals>

If you are having trouble with the file, contact [procureinquiry@hias.org](mailto:procureinquiry@hias.org) immediately. Delays with accessing the file will not constitute an extension of the submission period.

**ANNEX IV: TECHNICAL SPECIFICATIONS**

- A. Document and update business practices in coordination with business unit leadership, developing and maintaining written policies and procedures for all financial management activities, assessing and coordinating user satisfaction and needs.
- B. In conjunction with the functional units and other stakeholders, analyze the appropriateness of applications to business practices, develop requirements, source, and design, including a comprehensive review and revision of the Management Accounting Structure, including the Chart of Accounts and related Management Reporting Dimensions.
- C. Lead Needs Assessment for the ERP and create a Requirements Document to accompany the RFP; elements of ERP include Accounting, Budget and Forecast, Payroll, Timekeeping, (Human Resource Information System (HRIS) and contributions (Raiser's Edge), but priority needs to be placed on the Accounting system, as well as the Budget and Forecasting System, including Payroll, in the first phase of implementation.
- D. Lead on the selection of ERP application modules or the equivalent, as well as on the selection of the ultimate ERP vendor.
- E. Help ensure integration of data between the various applications and ERP modules, as well as to the currently utilized HIAS applications, including Raiser's Edge, Anybill, etc.
- F. Help determine which modules should be included in the implementation project and develop a schedule for a phased implementation approach in consultation with HIAS management.
- G. Plan and implement organization wide training on the new Accounting Structure and Chart of Accounts, as applicable to various staff; create reference materials and post them on HIAS Net (internal SharePoint site).
- H. As appropriate, assist HIAS staff to identify a position(s) that will be responsible for tasks including, but not limited to, the following:
  - Oversee the maintenance and troubleshooting of financial systems and related issues organization wide and investigate efficiencies and document issues and solutions with the financial software
  - Work with vendors to create new reports as needed
  - Work with IT Department and vendors to implement updates as needed
  - Examine all financial systems with a focus on technology enhancements, project costing, grants compliance and improving operational efficiencies and make recommendations about new reports, upgrades, changes and implementations of software solutions on an ongoing basis



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**ANNEX V: PROPOSAL SUBMISSION FORM**

RFP ID.: "ERP Consultant 1/22/2021"

Dear HIAS,

Having examined the Proposal Documents, the receipt of which is hereby duly acknowledged, we, the undersigned, offer to supply and deliver travel management services in conformity with the Technical Requirements for the sum of [total Proposal amount in words and figures] as may be ascertained following the Price Schedule attached herewith and made part of this Proposal.

We undertake, if our Proposal is accepted, to deliver the goods following the Technical Requirements.

We confirm that, based on our current knowledge, there are no real or potential conflicts of interest involved in rendering Services for HIAS. In this regard, we have listed, if any, all the contracts that we have been involved with HIAS as per the attached. Our policy on dealing with conflicts of interest, should these arise, is also set out as per the attached. We acknowledge and agree that HIAS has the right to determine whether there is any actual or potential conflict of interest in its sole discretion.

We agree to abide by this Proposal for 120 days from the Deadline for submission of Proposals. We undertake, if our Proposal is accepted, to initiate the services no later than the date indicated in the data sheet.

We understand that you are not bound to accept any Proposal you may receive.

We agree to the General Terms and Conditions except for ..... (insert titles of the General Terms and Conditions from Annex III and on a separate sheet, detail the likely changes that would be proposed), which we plan to negotiate with HIAS in the event we are the winning applicant.

Name	Signature	Date

Title	Organization	EIN, if applicable:

Address	Email	Phone





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**ANNEX VI: PRICE SCHEDULE**

- 1) The Price Schedule must provide a detailed cost breakdown for each item.
- 2) Technical descriptions for each proposed item must provide sufficient detail to allow HIAS to determine compliance of the Proposal with specifications as per the Technical Specifications of this RFP.
- 3) The following format is recommended for use in preparing the Price Schedule. The format uses a specific structure that may or may not be applicable but is indicated to serve as an example.

NAME OF APPLICANT					
ITEM	DESCRIPTION	UNIT	UNIT PRICE*	QUANTITY REQUIRED	TOTAL PRICE PER ITEM
GRAND TOTAL					

Note: In case of a discrepancy between the unit price and total, the unit price shall prevail.

Signature of Applicant

