



REQUEST FOR PROPOSAL (RFP)

FOR CORUS INTERNATIONAL

ENTERPRISE RESOURCE PLANNING (ERP)

SYSTEM DEFINITION REQUIREMENT CONSULTANCY

Introduction

Corus International (Corus) is the parent organization of a family of long-serving, faith-based organizations committed to ending poverty and building healthy communities in the world's most challenging places. Drawing on a heritage of nearly 150 combined years, Corus connects and catalyzes non-profit and for-profit subsidiaries that include Lutheran World Relief, IMA World Health, CGA Technologies, Ground Up Investing, IMA Innovations, and LWR Farmers Market Brand LLC. Alongside communities in fragile settings, their dedicated experts integrate disciplines, approaches, and people to grow local economies, eliminate extreme poverty, ensure access to quality healthcare, mitigate climate change, and respond to humanitarian crises.

Corus intends to proceed through an RFP process resulting in a consultancy to conduct a systems definition requirement process which will lead to the ultimate development of a Request for Proposal (RFP) and vendor selection for the purchase and implementation of an Enterprise Resource Planning (ERP) system.

Through this future relationship, Corus seeks to achieve the following important business benefits:

- Ensure potential vendors have the information necessary to understand Corus' ERP needs and organizational culture to provide an informed proposal back to Corus with an appropriate system, project timelines, implementation, staff training, and costs;
- Introduce any special factors related to Corus' environment and needs for potential vendors consideration in the RFP;
- Introduce a checklist of basic features/functionality of ERP solutions of interest to Corus in the RFP; and
- Provide potential vendors more specific information on selection process and criteria, to ensure the exchange of information between potential vendors and Corus is efficient.



Corus Systems Overview

Corus currently uses the following software platforms:

Platform	Department	Use
Adaptive Planning Financial Management (APFM)	All	Budgeting
Adobe Sign	Finance & Accounting	Electronic signatures
ADP	All	Payroll
AnyBill	Finance & Accounting	US on-line invoice approval and payment platform
AuditBoard	Legal/Grants/Contracts/- Compliance	Internal audit and enterprise risk management software
Convercent	Legal/Grants/Contracts/- Compliance	Hotline and reported case management
INTL	Finance & Accounting	International wire transfer platform
MIP	Finance & Accounting	G/L, Accounts Receivable, Accounts Payable
Phoenix (Salesforce)	Finance & Accounting, Programs	Project Management
QuickBooks	Finance & Accounting	G/L, Accounts Receivable, Accounts Payable (Country Offices)
Raisers Edge	Donor Relations, Constituent Engagement	Fundraising software
Western Union	Finance & Accounting	International wire transfer platform

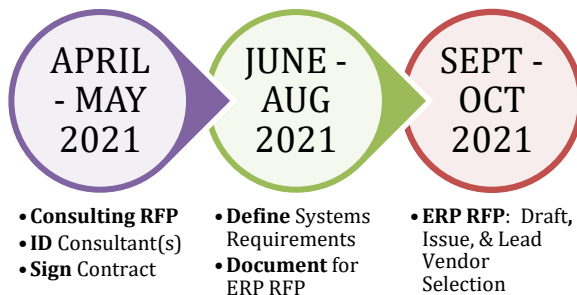
Missing in our systems are a procurement system, an electronic document management/review/signature system, and a warehousing system, among others that we would look to the ERP to provide.



Detailed Scope of Work

The following scope of work is required for successful completion of this consultancy:

PHASE 1



1. Coordinate and lead the Steering Committee Stakeholder Team.
2. Lead cross-departmental work teams and develop and document detailed system requirement documents that define the functional modules to be evaluated as part of the ERP RFP, listing within each module the specific **key** functionality or requirements for that module that will allow a compare and contrast of the software solutions presented at the ERP RFP stage. Rank the key requirements, noting which are most critical to the decision (e.g., required, important, nice to have, explore, etc.).
3. Define technology-based specifications the organization has that will influence the software decision, including cloud vs. on-premises, database preference, operating system preference, hardware specifications, programming language, interface or integrations requirements to other applications, and IT support staff – from both a HQ and a country office perspective.
4. Assist Corus in identifying an estimated price range for an ERP software and system implementation to aid in internal budgetary preparations.
5. Prepare a Request for Proposal (RFP) to be issued by Corus for new ERP software and implementation services that will allow for thorough comparison of all qualified vendors. The RFP must be prepared in compliance with Corus' procurement policies and procedures.
6. Lead Corus through the ERP software selection process including:
 - a. Drafting presentation for (and lead) vendor pre-proposal conference.
 - b. Drafting and coordinating responses to vendor questions during the proposal period.
 - c. Develop evaluation materials to include criteria, demonstration, and interview scripts, scoring criteria, and scoring analysis.
 - d. Coordinating of software demonstrations and on-site/virtual presentations.
 - e. Assisting with the identification of potential risks and issues to ensure Corus makes a complete & informed selection decision.
 - f. Participating in evaluation of vendors and interviewing process.
7. Participate in contract negotiations with selected vendor to ensure a performance-based contract,



where milestones are paid when accomplished.

PHASE 2



1. Guide Corus through the implementation of the selected software and assist with the identification and assessment of process changes necessary for a successful ERP software roll-out.
2. Perform the duties of an Executive Project Manager through all phases of this project, ending with the successful implementation of new Enterprise Resource Planning (ERP) software.
3. Act as a liaison between the Steering Committee Stakeholder Team, Project Team, Vendor(s), and Corus staff.
4. Work with Vendor and Project Team to develop and manage a comprehensive project plan, detailing project stages, milestones, training of global staff, and resources.
5. Manage the change management process with oversight from the CFO for both the project and the selected vendor contract.
6. Ensure adequate knowledge transfer to Corus staff to configure, manage, operate, and support the new ERP software.
7. Provide routine project status reports and deliver status presentations as needed.

Project Deliverables

1. Project documents necessary to support a project of this size – project plan, communications plan, executive status reports, training plan, etc.
2. Detailed System Requirement Document detailing the specific key functionality/requirements for each module required for the ERP RFP, in ranked order (e.g., required, important, nice to have, explore, etc.).
3. Detailed Document detailing the technology-based specifications influencing the software decision (HQ and country office perspectives).
4. ERP RFP document for issuance, that is compliant with Corus' procurement policy.
5. Lead vendor pre-proposal conference.
6. Draft and coordinate responses to vendor questions during the proposal period.
7. Develop evaluation materials to include criteria, demonstration, and interview scripts, scoring criteria,



- and scoring analysis.
8. Coordination of software demonstrations and on-site/virtual presentations.
 9. Assist with the identification of potential risks and issues to ensure Corus makes a complete and informed selection decision.
 10. Lead evaluation of vendors and interviewing process.
 11. Contribute to contract negotiations with selected vendor to ensure a performance-based contract, where milestones are paid when accomplished.
 12. Perform the duties of an Executive Project Manager through all phases of this project, ending with the successful implementation of new Enterprise Resource Planning (ERP) software.
 13. Facilitate implementation, schedule, data migration, vendor relationship and contract compliance. Provide routine project status reports and deliver status presentations as needed.
 14. Work with Vendor and Project Team to develop and manage a comprehensive project plan, detailing project stages, milestones, training of global staff, and resources.
 15. Manage the change management process with oversight from the CFO for both the project and the selected vendor contract.
 16. Assist with the identification and assessment of process changes necessary for a successful ERP software roll-out.
 17. Act as a liaison between the Steering Committee Stakeholder Team, Project Team, Vendor(s), and Corus staff.
 18. Ensure adequate knowledge transfer to Corus staff to configure, manage, operate, and support the new ERP software.

RFP Response Details

Companies/Individuals who meet the above requirements and are interested in participating in the Request for Proposal (RFP) should provide a response to Kelly Pence at kpence@corusinternational.org no later than **5:00pm EST, April 30, 2021. Please do not call.**

Proposal Contents

Proposals are to include, but not necessarily be limited to, the content listed below. The volume, or size of the proposal, should be consistent with the relative size of the project. Concise proposals without needless duplication are encouraged.

1. Letter of transmittal. Include an introductory letter expressing interest in the project, as well as what value you add to the ERP selection and implementation process. The letter should include name of firm, RFP contact person, email address, mailing address, telephone number, and must be signed by a person authorized to bind the firm.
2. Project Description and Approach. Provide a statement of the services to be provided including a



detailed explanation of how the services are to be provided and managed. Indicate how important each service is to successful project completion. Identify the expected involvement by Corus staff for each major activity in the project. A project schedule should be included in this section.

3. **Project Team.** List the experience and qualifications of staff who will be working on the project. Describe the applicable skills and accomplishments of the project manager including experience negotiating ERP contracts and knowledge of Non-Governmental Accounting Standards. Describe project methodology experience and any applicable certifications such as Certified Project Management Professional from the Project Management Institute. Confirm availability and commitment of named key staff to the project and estimated level of effort on the project. Describe how project management, coordination and communications with the Corus will be accomplished. Do not include persons who will not be working on the project. Indicate what resources are available if additional support is requested. Include resumes at the back of the proposal which reflect education, registrations, and experience of key staff.
4. **Related Experience.** Provide project descriptions for up to five recent projects similar in nature and size to the proposed project, including type of entity, start and completion dates, selected software vendor; and measures used to indicate quality and successful project completion. Include the company names of all software vendors responding to each of these five recent projects. Provide client reference names and phone numbers.
5. **Cost Proposal.** Provide a cost proposal to perform the scope of work, broken out by Phase 1 and Phase 2. Include estimated person hours, labor costs and expenses for each task listed in the scope of work. The proposed costs should include any applicable travel and/or other expenses. Travel costs must be included in the cost proposal. Travel costs will only be paid through reimbursements.

Clearly describe any deviation from the listed scope of work that would significantly affect costs. Separate the cost of any proposed optional services from the cost of services requested. The format for the cost proposal is to be selected by the consultant.

Include a listing of hourly rates for all employee classifications anticipated to work on the project, as well as rates for non-labor direct expenses. Include similar information for any major sub consultants. The listed rates will be used in preparation of any future change orders.

Please provide detailed pricing including any additional or ancillary costs that we would incur. Provide reasoning as to why the proposed pricing model is best for Corus.

Outline any other additional services and products that have an additional cost.

6. **Sample Deliverables.** Provide, in electronic format, samples of project and communication plans and project status reports created for referenced projects.
7. Please also refer to Attachment B – Terms & Conditions.



Questions related to the RFP should be emailed to the Corus contact below by 5:00 PM EST, April 21, 2021.

Answers will be shared with all potential respondents by 5:00 PM EST, April 23, 2021.

RFP Costs – Any resources expended in responding to this RFP, including any costs incurred in proposal preparation or presentation, are the sole responsibility of the Respondent.

RFP Review

Based on RFP submissions, Corus will shortlist those respondents most capable of meeting our request. We anticipate shortlisted Respondents to provide a virtual presentation of their company, experience, and what they will do for Corus, and **completing contract negotiations prior to May 31, 2021 and beginning the scope of work by June 1, 2021.**

CORUS Contact:

Ms. Kelly Pence

Senior Director, Domestic Operations

kpence@corusinternational.org

700 Light Street

Baltimore, MD 21230



ATTACHMENT A

CORUS COUNTRIES WHERE WE OPERATE

- Burkina Faso
- Colombia
- Democratic Republic of Congo
- Ecuador
- El Salvador
- Guatemala
- Haiti
- Honduras
- India
- Indonesia
- Iraq
- Kenya
- Lebanon
- Mali
- Nepal
- Nicaragua
- Niger
- Peru
- Philippines
- South Sudan
- Syria
- Tanzania
- Uganda
- United States
- Yemen



ATTACHMENT B

Terms and Conditions

1. All Proposals must be in the English language, signed and dated by an authorized employee of the Bidder.
2. Prospective Bidders are under no obligation to prepare or submit proposals in response to this RFP and do so solely at their own risk and expense. Corus will not reimburse any costs incurred related to this RFP.
3. Bidders are solely responsible to ensure the timely receipt of their proposals. Proposals received after the date and time required will, generally, not be considered unless no other proposals are received.
4. Proposals may not be altered or corrected after the Date of Receipt, except when Corus at its sole discretion, may permit correction of arithmetic errors, transposition errors, or other clerical or minor mistakes, in cases in which Corus deems that both the mistake and the intended proposal can be established conclusively on the face of the proposal.
5. Issuance of this RFP does not constitute an award commitment on the part of the Corus, nor does it commit Corus to pay for costs incurred in the preparation and submission of a bid.
6. Corus may contact bidders to confirm contact person, address, bid amount and to confirm that the bid was submitted for this solicitation.

False Statements in the Bid:

Bidders must provide full, accurate and complete information as required by this solicitation and its attachments.

Conflict of Interest Disclosure:

Bidders must provide disclosure of any past, present, or future relationships with any parties associated with the issuance, review or management of this solicitation and anticipated award. Failure to provide full and open disclosure may result in Corus having to re-evaluate selection of a potential bidder.

Right to Select/Reject

Corus reserves the right to select and negotiate with those firms it determines, in its sole discretion, to be qualified for competitive proposals and to terminate negotiations without incurring any liability. Corus also reserves the right to reject any or all proposals received without explanation.



Reserved rights:

All RFP responses become the property of Corus and Corus reserves the right in its sole discretion to:

1. To disqualify any offer based on Bidder's failure to follow solicitation instructions;
2. To waive any deviations by Bidder from the requirements of this solicitation that in Corus opinion are considered not to be material defects requiring rejection or disqualification; or where such a waiver will promote increased competition;
3. Extend the time for submission of all RFP responses after notification to all interested Bidders;
4. Terminate or modify the RFP process at any time and re-issue the RFP to whomever Corus deems appropriate;
5. Issue an award based on the initial evaluation of offers without discussion;
6. Award only part of the activities in the solicitation or issue multiple awards based on solicitation activities.

Source Selection Criteria:

Award will be made to the Bidder submitting a response that meets or exceeds the technical acceptability standards. Technical capability will be evaluated by how well the proposed services meet the minimum technical specifications and requirements set forth in this RFP.

The evaluation criteria will be based on the following factors:

1. Conformance to the technical specifications and requirements
2. Past Performance