Accounting ERP Implementation and Integration Partner

Proposal Title: Accounting ERP Solution Provider
Date RFP is issued: November 7, 2024
Due Submission Date: November 20, 2024

➤ **About IYF:**

The [International Youth Foundation (IYF)](#) invests in the extraordinary potential of young people. Founded in 1990, IYF builds and maintains a worldwide community of businesses, governments, and civil society organizations committed to empowering youth to be healthy, productive, and engaged citizens. IYF programs are catalysts of change that help young people obtain a quality education, gain employability skills, make healthy choices, and improve their communities.

Background

IYF is a USA based public charity, tax-exempt under Section 501(c) (3) of the Internal Revenue Code and has been determined by the IRS not to be a private foundation.

IYF's operating budget is approximately $20 million, including $15 million in program grants and contracts. Funding of IYF's program work is divided between corporations/corporate foundations and government overseas development assistance (ODA) agencies (e.g., US Agency for International Development.

IYF last upgraded its accounting software to Infor Cloud SunSystems in December 2018. Grant records are kept using GIFTS Online, a specialized database program managed by Blackbaud. IYF operates on a calendar fiscal year, ending December 31.

IYF's headquarters is in Baltimore, Maryland, USA. IYF has fully registered country offices in Ethiopia, Mexico, Palestine and Zimbabwe. The following table delineates the size, staff and transaction levels by location.

Locations	Size	# Staff by Location	Monthly Average Volume of Transactions
USA	HQ	57*	300
Ethiopia	Small	5	20
Mexico	Large	21	85
Zimbabwe	Medium	16	40

*Includes 1 US expatriate staff

➤ **Purpose of the Proposal:**

The purpose of this RFP is to assist IYF to choose the best accounting and finance Enterprise Resource Planning Solution (ERPS) for use in managing day-to-day business activities such as accounting, procurement, project management, risk management and compliance. Also, to provide IYF the design, customization, and implementation services needed for the ERPS and all subsystems. The following information is provided to assist your firm in determining if your products and capabilities match the needs of IYF.

Please note that IYF is an international nongovernmental organization (INGO), which receives grant funding from the US government. As such, we are subject to the Fly America Act and specific accounting and reporting requirements. We are seeking an Accounting Systems Implementation and Integration Partner who has significant experience with the design and implementation of true cloud, native SaaS solutions. Implementation Partners with experience serving clients in the Not-for-Profit/International Non-Governmental Organizations sector are preferred. Please review the requirements listed below to determine if your firm is well-suited to serve IYF's needs before submitting a response to this RFP. Your firm must be capable of providing the following minimum types of services:

- Years of experience in ERP software selection, implementation, selling and support
- Experience in defining and documenting business requirements.
- Interviewing partners and software vendors and building a project plan for a successful implementation.
- Implementing consultants with strong accounting background and not-for-profit/international NGO experience.

> ## **Scope of work**

IYF is interested in securing the best suited Financial Management ERP Software with the following modules/functionalities within a suite:
1. Single business entity with global operations consolidations
2. Cloud based
3. Multi-currency
4. General Ledger
5. Cash Management
6. Purchasing
7. Accounts Payable and Vendor payment services
8. Accounts Receivable
9. Employee Expense
10. Revenue Recognition
11. Grants management
12. Project management, including Time Entry
13. Dynamic Cost Allocation
14. Fixed Assets
15. Budgeting and Long-term planning
16. Standard and Custom Reports
17. Dashboard showing cash flow, pending payments, and critical reports
18. Integration with major US National Banks (JP Morgan, Bank of America, Citi Bank)
19. Integration with major Payroll/HRIS systems, Global payment platforms, Travel and Expense reporting CRMs.
20. Learning management and Sandbox Environment

The ERP Implementation and Integration Partner shall, in addition to helping with selecting the optimum solutions, help with software subscription procurements and provide planning, design, customization, implementation, and integration services necessary to go live with the final solution including data migrations, testing, end-user trainings, assistance with import/export templates for CRM, and post go-live support.

Eligibility Criteria

To be eligible for this assignment, the individual/professional firm must meet the following criteria:
- Legally registered and based in USA
- Experience with US-based international NGOs
- Ability to support multi-currency.
- Multiple languages a plus.

> **Payment Method:**
> All services including subscription fees are invoiced to IYF when due and are paid through bank transfer.

> **Cost Liability:**
>
> IYF assumes no responsibility and bears no liability for cost incurred by bidders in the preparation and submittal of proposals in response to this RFP.

Proposals

Proposals should include:

- Subject Line: Accounting ERP - [Firm Name]
- Information about the firm, including number of partners and CPAs and years in existence.
- At least three references (name, organization and e-mail address) from international NFP/NGO clients.
- Three ERP Software solutions in order of preference.
- Proposed annual fee, including expenses, for 2025-2029.
- Each bidder is given wide latitude in the degree of detail it elects to offer or extent to which plans, designs, systems, procedures are revealed. However, insufficient detail may result in a determination that the bid proposal is materially non-responsive or may lower its technical score.

Proposals should be submitted to the Controller by **20 November 2024**.

Ayo Abraham, Controller
International Youth Foundation (IYF)
a.abraham@iyfglobal.org

Questions

Specific questions related to the details of this RFP should be directed to the Controller, Ayo Abraham at a.abraham@iyfglobal.org on or before **14 November 2024**.

Timeline

IYF plans to reach out to finalists for demos by 15 December 2024 Proposals shall be reviewed for eligibility criteria, cost and quality considerations, as well as history working with international non-profit organizations.

Thank you for your interest in the International Youth Foundation.

For cost estimates:

Please use the following table to provide your pricing and indicate any discount (such as Not-for-Profit discounts) on applicable Modules or service component. You may edit the template to accommodate anything not included, but we prefer that you present your estimate in this format for ease of comparison (an Excel version is available if you need it):

Estimated Project Costs

Annual Subscription Fees	Count	Costs in USD		
		Software 1	Software 2	Software 3
		Please Name	Please Name	Please Name
Financial Management - General Ledger, Cash Management, Purchase Order, Accounts Payable, Order Entry, Accounts Receivable, Employee Expense, Standard Reports, Dashboard, for a Single Business Entity with Global consolidations	1			
Business Users	7			
1000 Additional Entities	1			
Employee Pack (10 User Pack)	1			
Learning Management	1			
Fixed Assets	1			
Multicurrency	1			
Developers License	1			
Global Consolidation	1			
Project Tracking	1			
Dynamic Allocations	1			
Grants Management & Accounting	1			
Budgeting & Planning	1			
Project Management, Includes Time Entry	60			
Subtotal		-	-	-
Sandbox Environment cost				
Estimated Annual Subscription Fees		$ -	$ -	$ -

Estimated Consulting Services	Hours	Rate	Total		Total	
Planning & Design - Presentation of SOW & Design Document			$	-	$	-
Implementation Services - Core Financials			$	-	$	-
End User Training - Financials			$	-	$	-
Financial Data Migration			$	-	$	-
Fixed Assets			$	-	$	-
Global Consolidations			$	-	$	-
Multi-currency			$	-	$	-
Project Management Solution/Time Entry			$	-	$	-
Assist with Import/Export Templates for CRM			$	-	$	-
Financial Report Training			$	-	$	-
Post Go Live			$	-	$	-
			$	-	$	-
Estimated Level of Effort/consulting cost			**$**	**-**	**$**	**-**