

# Request for Proposals: ERP Selection



## Introduction:

### A. Introduction

Central Valley Community Foundation is requesting proposals from qualified and experienced firms or individuals to provide consulting services in support of efforts to replace the Enterprise Resource Planning System (ERP). A complete Scope of Work is detailed below.

### B. Background

CVCF is a non-profit community foundation serving California's Central San Joaquin Valley. We are currently using iPhi which we migrated to from a software called FIMS in April of 2020. We currently have 30 users but not everyone takes advantage of the system due to the UI not being friendly for the end user.

There are many challenges associated with the current ERP system, including flaws in the financial reporting and notification system as well as a lack of support for the application itself. On top of that it lacks back-end integration components that keep our systems, such as our document management and SQL database from speaking directly to the system. This requires us to go through an unnecessary ETL process to upload data into iPhi.

### C. Questions

All questions regarding the proposal should be sent to CVCF at:

**James Houston**

[James@centralvalleycf.org](mailto:James@centralvalleycf.org)

*Business Process Systems & Data Analyst*

### D. Timeline

RFP issue date:	12/03/2024
Proposals due date:	12/20/2024
Interviews & Reference Checks:	Week of - 01/06/2025
Proposal Selected:	01/17/2025
Contract with Selected Firm:	01/24/2025
Project Start Date:	ASAP following contract approval

## E. Qualifications

All applicants for consideration must submit documentation to support the following:

1. Strong background on ERP software systems and selection, contracting, implementation and API integration.
  - a. Submission of list of similar projects performed over the last five (5) years, including size of projects, time duration of projects, current contact information including name and phone number.
2. Sufficient levels of staff to complete the project by CVCF 1<sup>st</sup> quarter of 2025.
3. Adequate levels of professional liability insurance for all disciplines sufficient to cover the services and resulting response provided.
  - a. Submit all necessary proof of insurance and any additional documentation requested.
4. Staff experience: Firm must commit an individual project representative with at least five (5) years of experience with similar projects, comparable in size and complexity.
  - a. Must submit Resume/CV of all staff involved in project.

## I. Period of Agreement

Any agreement awarded as a result of this RFP will be for up to 1 year, with project review and contract renewal required on an annual basis until the project is completed.

## II. Scope of Work:

- A. Develop and document existing (as is) and proposed (to be) functional and data requirements, including business process workflow for all departments.
- B. Prepare a Request for Proposals (RFP) to be issued by the CVCF for new ERP software and implementation services that will allow for thorough comparison of all qualified vendors.
- C. Lead CVCF through the ERP software selection process including coordinating software demonstrations and on-site visits. Assist with the identification of potential risks and issues to ensure the CVCF makes a quality selection decision for the long-term.
- D. Participate in contract negotiations with selected vendor to ensure a performance-based contract, where milestones are paid when accomplished.
- E. Guide the CVCF project team through the implementation of the selected software if necessary. A separate contract would be initiated for the implementation.
- F. Perform the duties of an Executive Project Manager through all phases of this project.

### III. Project Deliverables:

- A. Project documents necessary to support a project of this size – project plan, communications plan, executive status reports, etc.
- B. Requirements Analysis Report detailing the functional and data requirements, including business process workflow needed for the new ERP system.
- C. Completed RFP for new ERP software and implementation with CVCF Project Team.
- D. Evaluation and recommendation of vendor proposals for the new ERP software and implementation.
- E. New ERP vendor contract negotiated with the best interests of CVCF and all needs included.
- F. Successful completion of the ERP replacement project scope of work by end of CVCF 1<sup>st</sup> quarter 2025.

### IV. Evaluation and Selection Criteria:

- A. Understanding and approach to the project.
- B. Demonstrated experience in similar projects. (Community Foundations preferred)
- C. References from other community foundations and organizations with which consulting agency or consultant has worked.
- D. Consistency and qualifications of key staff assigned to the project.
- E. Capacity to effectively undertake the scope of the project by CVCF 1<sup>st</sup> Quarter 2025.

### V. Instructions to Applicants.

- A. **Proposal Submission**
  - a. Response to RFP must be submitted to: [James@centralvalleycf.org](mailto:James@centralvalleycf.org)
- B. **Submission**
  - a. Cover letter signed by an authorized person.
  - b. Executive Summary.
  - c. Project scope, methodology and timeline statement describing specific capabilities, approaches and methodologies that demonstrate a clear understanding of the nature of the service to be performed described in detail in section II under ‘Scope of Work’.
  - d. List of similar projects performed over the last five (5) years, including size of projects, current contact information of coordinating personnel including name, title, email, and phone number.
  - e. Resume/CV for key personnel who will be assigned on the project.
  - f. Estimated itemized cost.
  - g. Submit any insurance certificates requested by CVCF.
  - h. Local and federal business licenses and permits.
- C. **Submission Expenses**
  - a. Respondents shall be fully responsible for all costs incurred in the development and submission of this RFP.
- D. **Reservations**
  - a. CVCF reserves the right to do the following at any time and for its own convenience, at its sole discretion.
    - i. To reject any and all proposals without indicating any reasons for such rejection.
    - ii. Terminate this RFP and issue a new request for proposals anytime thereafter.

- iii. Extend any or all deadlines specified in the RFP, including deadlines for accepting proposals by issuing an Addendum at any time prior to the deadline for receipt of responses to the RFP.
- iv. Procure any services specified in the RFP by other means.
- v. Reject the proposal of any Respondent that is in breach of or in default under any other agreement with CVCF.
- vi. Reject any Respondent deemed by the CVCF be non-responsive, unreliable, unqualified or non-responsible.

#### **E. Subcontractors**

Consultant shall not assign, subcontract, or delegate the performance of its services to any person, corporation, or entity without the prior written consent of CVCF. Provided that such consent is obtained, it is understood and agreed that any such persons, corporations, or entities hired by consultant shall be deemed agents of Consultant and that Consultant shall be responsible for the methods, means, and materials used in connection with the performance of any such services, and for any breach of this Agreement or any delays or damages occasioned by such work.

#### **F. Addenda**

No one is authorized to amend any of these documents in any respect by an oral statement or to make any representation or interpretation in conflict with their provisions. Any changes to these documents will be issued in writing via Addenda to the email submission.

#### **G. Client References**

Respondents shall provide a minimum of three (3) references. Each reference must include the name of the agency, description of services that were provided, date of services, contract amount for projects similar to the services requested in this RFP and contact information of a representative from the agency with whom the Respondent worked during the project.

#### **Proposal Contact Information:**

**Organization:** Central Valley Community Foundation.

**Lead:** James Houston

**Email:** [James@centralvalleycf.org](mailto:James@centralvalleycf.org)

**Phone:** 559-226-5600

**Address:** 1260 Fulton St. Suite 200 Fresno, CA 3721