



Vital Strategies | HRIS Project

Request for Proposal
Description
Version: 1.0



Table of Contents

1. INITIATIVE OVERVIEW	2
1.1. VITAL STRATEGIES STATEMENT OF BUSINESS	2
1.2. PROJECT BACKGROUND	3
1.3. GLOBAL CLIENT EXPERIENCE	3
1.4. PROJECT VISION	3
2. RFI - RFP OVERVIEW	4
2.1. REQUEST FOR PROPOSAL (RFP)	4
2.2. SCOPE	5
3. RFP INSTRUCTIONS	5
3.1. OVERALL INSTRUCTIONS	5
3.2. TIMELINE AND KEY DATES	6
3.3. INFORMATIONAL DOCUMENTS	6
3.4. ROUND 1: PROPOSAL TEMPLATES	6
3.5. ROUND 2: DEMOS/Q&A	6
4. PROPOSAL EVALUATION CRITERIA	7
5. INSTRUCTIONS FOR COMPLETING ROUND 1 PROPOSAL TEMPLATES	7
5.1. RFP REQUIREMENTS AND FINANCIAL SCORECARD	7
5.2. RFP PROPOSAL NARRATIVE	9
6. INSTRUCTIONS FOR ROUND 2 DEMOS AND Q&A	9
7. FACT FINDING QUESTIONS AND ANSWERS	9
8. ADMINISTRATION	10
8.1. NOTIFICATION OF DECLINATION OR INCLUSION IN THE RFP	10
8.2. CONTACT	10
8.3. TERMS & CONDITIONS OF THE SOLICITATION	10



1. INITIATIVE OVERVIEW

1.1. VITAL STRATEGIES STATEMENT OF BUSINESS

Vital Strategies helps governments strengthen their public health systems to contend with the most important and difficult health challenges. We design solutions that can scale rapidly and improve the lives of millions of people. **Our mission is to work in partnership to reimagine evidence-based, locally driven policies and practices to advance public health.**

A public health system is the often-invisible web of protections that help us lead long, productive and healthy lives. It is regulations that keep toxins out of our food and pollutants out of the air we breathe. It is data that informs decisions about health policy, and systems that empower people to make healthier choices.

Vital Strategies' vision is a world where everyone is protected by equitable and effective public health systems.

Our Values

Our organizational values are the foundation of all of our work.

Inclusive collaboration

We engage others, both inside and outside of the organization, to find the best solutions. We seek to listen to different perspectives and incorporate them into clear decision-making processes.

Respect

With interest and humility, we seek to understand the context where we work and learn from the expertise and experience of those with whom we work.

Commitment to learning

We reflect on our progress, build on our knowledge, and adjust our approach as needed to achieve the best outcomes.

Ability to adapt

We are able and willing to adapt to new and evolving circumstances to ensure relevance and effectiveness of our work.



1.2. PROJECT BACKGROUND

Vital Strategies’ Human Resource (HR) systems landscape currently comprises disparate systems. This results in inefficiencies, redundancies in processes, over-spending, and an inability to meet Vital Strategies’ evolving business needs. This makes our work more difficult, inconsistent and inefficient across Vital Strategies. This project is an effort by Vital Strategies to address our core HR business needs as well as current best practices, then identify, select, and implement new HR System(s).

1.3. GLOBAL CLIENT EXPERIENCE

Vital Strategies global offices serve as hubs for work being done in many countries. In addition, employees are hired via Employers of Record.

Global Offices	Estimated No. of Staff	System Used for HRIS/Payroll	Data Restriction
New York, NY, United States	186	Suite People, Taleo & ADP Workforce Now	
São Paulo, Brazil	39	GRHNet	Local counsel to advise
Jinan, China	17	Government PEO	
Addis Ababa, Ethiopia	6	Praxima International Payroll Solution	Local counsel to advise
Paris, France	5		GDPR
Singapore	25	Infotech	PDPA
EOR	20	several	Varies
New Delhi, India	77	Pion HR	Local counsel to advise
Total	375		

1.4. PROJECT VISION

Vital Strategies is looking to improve its Human Resources systems by replacing many of the manual processes with technology tools, and enhancing its ability to provide business intelligence to the organization. We require a solution that can address our modern, ever-evolving global business needs, with a primary focus on core HR records, recruiting lifecycle, performance management, and data analytics. The solution should also be capable of feeding other systems as required, with minimal configuration. We want these solutions to be highly functional and configurable to meet our global business needs, but not so customized that they require additional rework (time and money) for initial configuration and ongoing system upgrades. Currently several payroll systems are in use to accommodate local standards (and will not be replaced). Vital Strategies will require that the HRIS host a record for every



employee of the organization with the ability to feed data to various payroll systems. We need an intuitive system interface that is easy to navigate and follow, without being clunky, confusing or frustrating. The system should allow authorized Vital Strategies users to create and modify workflows with steps, forms, notifications and approvals. Users should be able to track their progress and know what to do next. The system should have the ability to be configured in a way that restricts access to certain areas, reports, or data based on a set of controls that are designed on the basis of user roles and access permissions. Specifically, only the country data manager and their team should be able to access data from other countries if they have the required permission. The data in the system must be able to handle modern diversity, equity, and inclusion requirements, and also follow strict data management and privacy protocols such as GDPR and Taiwan PDPA.

The system we are considering must have an intuitive reporting functionality that can generate reports quickly and report off all data within the solution. Reliability is crucial, and the vendor must be responsive to Vital Strategies' support needs. It is essential that the system seamlessly integrates with Vital Strategies' other systems, such as NetSuite, Microsoft Office 365, and our budgeting system (which is yet to be determined) to ensure a smooth transition and operation.

The solution being proposed is aimed at effectively addressing our most critical business requirements, which include Core HR Records, Recruiting, and Performance Management. Additionally, it must be scalable enough to accommodate any new functionality or modules (such as Learning and Development) that may be required as our needs evolve over time.

We are seeking a solution that can be implemented to provide our staff with a reliable and equitable set of tools, which they will feel comfortable using. Our goal is to improve their work lives and also provide insightful data and reports that will enable us to make strong business decisions.

2. RFP OVERVIEW

Vital Strategies is beginning a competitive solicitation, a Request for Proposal (RFP), inviting vendors to respond to a comprehensive set of requirements and narrative questions.

2.1. REQUEST FOR PROPOSAL (RFP):

RFP Round 1: All vendors invited to the RFP process will complete the RFP proposal. The proposal includes a review of a comprehensive list of business, functional, and technical requirements, questions related to the pricing structure (annual licensing, implementation costs, etc.), and a set of narrative questions related to product capabilities, user experiences, and vendor services. The evaluation panel will score the proposals and advance a limited number of vendors to a short list.

RFP Round 2: Short-listed vendors will be invited to participate in a more comprehensive 3–4hour session. This presentation will include a live demonstration of how your systems will address a specific set of use cases. These demo sessions will conclude with a two-way question-and-answer session.

VITAL STRATEGIES will determine the vendor and system to move forward with preplanning and full implementation starting in 2024.

2.2. SCOPE



For the purpose of this RFP, Vital Strategies' immediate need is to procure a modern solution that manages:

- **Core HR Records** - Tracks employee (non-contingent and contingent staff) information throughout the employee's lifecycle (recruitment to onboarding through offboarding) and across Vital Strategies' annual business cycle (e.g., promotions, reviews, salary increases, etc.);
- **Talent Acquisition and Onboarding**– Manages all phases of talent acquisition (pipeline, candidate identification, interviews, selection and vetting (references, background checks) and;
- **Data Reporting** - Provides a comprehensive, internal facing reporting system.
- **Performance Management** – collaborative system where managers and employees together set expectations and employee goals, define performance measurement, provide feedback, complete performance reviews.

These areas highlight our core functionality/scope of this project and where most of our requirements pull from.

IMPORTANT NOTE: While Vital Strategies would prefer a solution that combines all the functional areas cited above into a single, integrated product suite, we will consider exceptional examples of stand-alone functionality as well. If your solution offers one portion of the above scope, please identify a partner vendor and respond with a unified, comprehensive solution to our requirements.

Additionally, we are *evaluating* solutions which have dedicated modules for:

- **Workforce Planning**
- **Compensation Management**

With regard to these areas, we have not prioritized requirements, but reflects our more secondary needs.

3. RFP INSTRUCTIONS

3.1. OVERALL INSTRUCTIONS

Vendors will be asked to review all RFP documentation and instructions and then complete the proposal documentation and submit it. There will be a one-week period where vendors are permitted to submit questions which Vital Strategies will anonymize, and post along with Vital Strategies' responses for all vendors to see. Vital Strategies will evaluate these Round 1 proposals and invite select vendors to prepare a system demonstration based on Vital Strategies specific Use Cases and walk Vital Strategies evaluators through the demos.



3.2. TIMELINE AND KEY DATES

RFP Round 1	Date
Invitation to RFP	May 15, 2024
Proposal Development Period	May 15 to 29, 2024
Fact Finding ‘Questions and Answers’ period	Ends May 22, 2024
RFP Proposals Due	May 29, 2024
RFP Proposal Review Period (Vital Strategies)	May 30 to June 5, 2024
Notify Vendors of Declination or Invitation to RFP Round 2	June 7, 2024

The schedule for RFP Round 2 will be scheduled directly with vendors invited to demo. The tentative date for reaching a final decision is mid-July 2024, with implementation to begin in the fall.

3.3. INFORMATIONAL DOCUMENTS

The following documents provide information about the RFP, process, and instructions as well as information about Vital Strategies.

Vital Strategies RFP – Description – *(this document) Detailed information about the initiative, and instructions for this RFP.*

Vital Strategies RFP – Proposal Template – *A workbook (excel) vendors will respond to with 4 tabs*

3.4. ROUND 1: PROPOSAL TEMPLATES

The following are documents that will be reviewed and populated by the Vendor.

Vital Strategies RFP - Description – *this document.*

Vital Strategies RFP – Proposal Template – *A workbook (excel) vendors will respond to with 4 tabs:*

- A. **Instructions** - *Information and instructions for this workbook*
- B. **Features** - *Requirements specific to Vital Strategies’ business*
- C. **Narrative** - *Narrative response*
- D. **Financial Information** – *Information on cost of your solution*

3.5. ROUND 2: DEMOS/Q&A

Round 2 will consist of a 4-hour Demo and Q&A. The session will include introductions (15 minutes), demos (2.5 hours total allowing for :30 minutes of in-demo questions or clarifications) and a Q&A



portion (45 min). We will take two 10-minute breaks during the 4-hour period. We will ask you to demonstrate solutions, following Use Case notes that will be provided with the invitation to Round 2. Keep in mind, these demos will be scored.

During Round 2 there may also be a Technical Q&A between Vital Strategies' technical staff and the appropriate technical staff from the vendor. This conversation will not be scored but may inform final decisions.

4. PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated based on the **Proposal Narrative, Requirements and Financial Information** components of the **Vital Strategies RFP – Proposal Template**. The Vital Strategies review panel will evaluate the narrative proposal against a set of criteria with higher scores being awarded for completeness and relevance to Vital Strategies' needs.

With respect to requirements, Vital Strategies is primarily focused on those listed in the HR Core records, Talent Acquisition and Reporting functional areas and the scoring will be weighted to reflect that. The scoring of requirements in other Functional Areas will contribute to a proposal's overall impression.

With respect to pricing Vital Strategies, as a not-for-profit organization, has a duty to be good stewards of donor funding. Based on this, we are extremely cost conscious and will be focused on identifying the best value for Vital Strategies.

5. INSTRUCTIONS FOR COMPLETING ROUND 1 PROPOSAL TEMPLATES

5.1. Vital Strategies RFP – Proposal Template

Instructions (tab A)

Review the instructions to complete this template.

Requirements (tab B)

For each of the requirement areas (tabs B) the vendor will review each requirement and determine if their solution meets the requirement by selection from four options:

Requirement Met

- **“Out of Box”** - Yes - *The solution can meet this requirement without the need to set/adjust Out of the Box configurations or the creation of customized (for Vital Strategies) functionality*
- **“Configuration”** - Yes – *The solution can meet the requirement with some changes to Out of the Box configuration settings*



- **“Custom Dev”** - Yes – *The solution can meet the requirement, but only with functionality customized development to Vital Strategies' needs*
- **“3rd Party”** - Yes – *The solution can meet the requirement, but only by means of integration with a 3rd Party partner's system*
- **No** - *The solution cannot meet the requirement*

On Roadmap

If a given requirement cannot currently be met by your system, but you have an answer on your Roadmap, please add a note in Column H to indicate when the functionality is expected to release.

Additional Comments

Please include any additional information you feel is relevant to how your system addresses this requirement. These comments are not required and should only be used to provide additional context or nuance.

Note: the examples given on some Requirements areas are not meant to be exhaustive list, but only examples of typical data tracking points.

Narrative (tab C)

Please provide your responses to the questions listed in this section.

Financial Information (tab D)

Please complete the financial information to the best of your ability. Vital Strategies is attempting to understand all costs and recognize that actual costs will vary based on numerous factors.

Leveraging the context provided by the RFP Informational documents complete the Financial Information tab.

1. Complete the **Recurring Costs** section.
 - a. Licensing prices should be listed Per Employee Per Year (PEPY)
 - b. Self-Services licenses refers to licenses required for employee/manager self-service activities (e.g. an employee reviewing & updating their own benefits, etc.)
2. Complete the **One-Time Costs** section –
 - a. Largely this focuses on Implementation cost, but identify any other one-time costs
3. If applicable complete the **Vendor Consulting Services** section.
4. Vendors should use the **Additional Information** rows to clarify pricing entries where needed

Please use the following **assumptions** when calculating costs:

- Vital Strategies will subscribe to minimum modules required for the following functionality: Core HR, Talent Acquisition/Pipeline, Performance Management and Reporting.
- Vital Strategies is comprised of the following user types:
 - **Primary HR Users** - *15 HR Primary users and would be heavy day to day users of the solution (e.g. Recruiters, HR Business Partners, etc.)*



- **Administrator Users** - 2 HR System Admins
 - **Self-Service Users** - 30 Non-Contingent Staff (FTE) and would need occasional access to the system (e.g. Self-Serve portals)
 - **Viewer Users** - 75 information consumers only
-
- Vital Strategies would license the Solution for a minimum of five years (apply discounts as applicable).
 - Vital Strategies is a not-for-profit entity. Please apply not-for-profit discounts.
 - All costs should be expressed in US Dollars

Vendors who do not provide the requested pricing estimates will not be considered for Phase 2 of the RFP.

5.2. ROUND 1: PROPOSAL SUBMISSION

After you have completed the proposal template document, please email the document to wrollo.consultant@vitalstrategies.org.

6. INSTRUCTIONS FOR ROUND 2 DEMOS AND Q&A

Vendors selected to advance to Round 2 of the RFP will be asked to demonstrate how their solution would accomplish the work modelled in the Use Cases that will be provided to vendors invited to Round 2. Keep in mind, these demos will be scored.

Important Note: While Vital Strategies would prefer to see a fully functioning demo, we recognize that full configuration may not always be possible given the time allotted to prepare for the demo. We also recognize the full functionality may not be available (e.g., sending an email notification in real time). Therefore, only, if necessary, prepare mockups of what something might look like (e.g., pre-send the email), and/or indicate during the demonstration what it might look like in a fully configured system.

7. FACT FINDING QUESTIONS AND ANSWERS

Fact-finding questions on this solicitation will be accepted via email from May 15 to May 22, 2024. Answers to submitted questions will be available to all participants via email notification. Please note that questions will be anonymized, but responses will not be confidential except in cases in which proprietary information is involved.

8. ADMINISTRATION



8.1. NOTIFICATION OF DECLINATION OR INCLUSION IN THE RFP

All declinations or invitations to the RFP Round 2 will be conducted through email.

Vital Strategies is unable to respond to individual requests for conversations or demos. All questions will be addressed in the Q&A of Round 1.

Shortlisted Vendors in Round 2 will have a direct contact for scheduling and logistics purposes.

Vital Strategies will not be providing detailed information or responses as to why a vendor was not selected to move on to Round 2 or was not chosen as the final vendor.

8.2. CONTACT

Will Rollo, HRIS Consultant

Email: wrollo.consultant@vitalstrategies.org

8.3. TERMS & CONDITIONS OF THE SOLICITATION

A. Notice of non-binding solicitation

Vital Strategies reserves the right to reject all bids received in response to this solicitation and is in no way bound to accept any proposal.

B. Confidentiality

All information provided by Vital Strategies as part of this solicitation must be treated as confidential. If any information is inappropriately released, Vital Strategies will seek appropriate remedies as allowed. Proposals, discussions, and all information received in response to this solicitation will be held as strictly confidential, except as otherwise noted.

C. Conflict of interest disclosure

Suppliers bidding on Vital Strategies business must disclose, to Vital Strategies any actual or potential conflicts of interest. Conflicts of interest could be present if there is a personal relationship with a Vital Strategies staff member that constitutes a significant financial interest, board memberships, other employment, and ownership or rights in intellectual property that may conflict with the supplier's obligations to Vital Strategies. Suppliers and Vital Strategies are protected when actual or perceived conflicts of interest are disclosed. When necessary, Vital Strategies will create a management plan that provides mitigation of potential risks presented by the disclosed conflict of interest.

D. Communication

All communications regarding this solicitation shall be directed to appropriate parties at Vital Strategies via the wrollo.consultant@vitalstrategies.org email. Contacting third parties involved in the project, the review panel, or any other party may be considered a conflict of interest and could



result in disqualification of the proposal.

E. Acceptance

Acceptance of a proposal does not imply acceptance of its terms and conditions. Vital Strategies reserves the option to negotiate on the final terms and conditions. We additionally reserve the right to negotiate the substance of the finalists' proposals, as well as the option of accepting partial components of a proposal if appropriate.