



Integrated Systems Assessment – Consultant Services

Introduction

Headquartered in Washington, D.C., with offices in more than 20 countries and programs in 60+ countries, the Solidarity Center (SC) is the largest U.S.-based international worker rights organization helping workers attain safe and healthy workplaces, family-supporting wages, dignity on the job, widespread democracy and greater equity at work and in their community. Allied with the AFL-CIO, the SC assists workers across the globe as, together, they fight discrimination, exploitation and the systems that entrench poverty—to achieve shared prosperity in the global economy. The SC acts on the fundamental principle that working people can, by exercising their right to freedom of association and forming trade unions and democratic worker rights organizations, collectively improve their jobs and workplaces, call on their governments to uphold laws and protect human rights, and be a force for democracy, social justice and inclusive economic development.

The SC engages with more than 900 partners around the world, including 500 trade unions, worker associations and communities, to provide a wide range of education, training, research, legal support and other resources to help build strong and effective trade unions and more just and equitable societies. Programs focus on human and worker rights awareness, union skills, occupational safety and health, economic literacy, human trafficking, women’s empowerment and bolstering workers in an increasingly informal economy. SC programs support and contribute to the global movement for labor rights.

The SC is funded through grants/cooperative agreements primarily from the National Endowment for Democracy (NED), the U.S. Agency for International Development (USAID), the U.S. Department of State (in particular, the Bureau for Human Rights, Democracy and Labor (DRL)) and the U.S. Department of Labor (Bureau of International Labor Affairs), as well as private foundations and individuals. The SC’s annual revenue has steadily risen from nearly \$42M in 2020 to \$74M in 2023. Unlike other international organizations that receive primarily bilateral or country-specific awards, the bulk of SC’s awards are global under which it implements multiple projects in various countries.

Integrated Systems and Knowledge Management Assessment

Background

The SC has established grants, financial, and operational management systems in place and is seeking to enhance its integrated systems and knowledge management platforms to align with organizational growth.¹ The SC is interested in assessing the organization’s integrated systems and knowledge management systems needs, particularly with regard to its grants management needs in conjunction with its financial reporting and tracking mechanisms. This investment in globally-integrated systems will enhance the organization’s coordination, resilience, and

¹ For the purposes of this assessment, “systems” refers to technology, platforms, and software.

efficiency; enable it to better respond to global shocks and crises and evaluate its existing metrics; and ultimately, multiply its impact and reach to be more effective pursuing its mission.

The assessment will include assessing learning and evaluation platforms, grants management, financial accounting, knowledge sharing, internal communications, and digital security and providing actionable recommendations. The recommendations will lead to improvements that will be crucial not only for the organization's own operations and infrastructure, especially given the increasing threats to labor activists worldwide, but also for increasing the effectiveness of its support to 1,000+ grassroots union partners.

Assessment Objectives

The assessment outcomes would support the SC to invest in a plan to improve and/or replace current systems. The goal is to match programmatic growth with strong, coherent infrastructure and support systems. Due to the current and projected growth of the organization, the intention to examine systems more holistically, and the availability of resources, the SC is looking for an external entity to conduct a systems assessment. The desired outcomes are the following:

- to map the organization's current internal systems (technology and platforms to support finance, grants management, data, security, internal communications, and interconnectedness, among others)
- to identify any gaps in internal systems
- to identify requirements
- to understand needs from a diverse set of stakeholders
- to provide actionable recommendations on system improvements that are responsive to identified needs

The organization has established existing internal controls. The assessment will not heavily focus on workflow solutions, staffing, or structure. The goal of the assessment is to provide organization wide efficiency and effectiveness recommendations as they relate to technology, platforms, and software.

This assessment is the first phase of a long-term work plan to upgrade current internal systems (technology, platforms, and software) infrastructure. To prepare for this assessment, the organization conducted an initial mapping of current systems, gaps and challenges, and requirements by interviewing internal stakeholders. Detailed takeaways from this process will be shared with the selected consultant.

Areas for Assessment:

- Existing Systems and Platforms:
 - Financial management and accounting
 - Expense reporting
 - Program/grants/awards management
 - Knowledge, monitoring, evaluation, and learning, data management
 - Subawards and contract administration, monitoring, and management
 - Internal communications
- AI tools
 - The SC is interested in better understanding how AI tools (such as Grants Assistant) might be explored and/or utilized to support efficiency and effectiveness.



The consultant should have broad expertise in systems (technology, platforms, and software) and be able to bridge the gap between field operations and DC based collaborators and decision-makers. They should understand the interconnected nature of the organization's needs and develop tailored solutions that are fit for purpose. The consultant should also have demonstrated knowledge of federal funding rules and regulations.

Deliverables

- 1) Detailed Assessment Report that identifies organizational systems strengths, weaknesses, requirements, and recommendations with a focus on the following:²
 - mapping that outlines findings of the current state of systems
 - updates or additions that are needed to systems infrastructure to ensure integrated systems that maximize efficiency, automate tasks as appropriate, streamline workflows, and provide real-time data access
 - identifies potential AI tools to support effectiveness and efficiency and outlines privacy and security considerations
 - the most critical areas requiring attention with recommendations for prioritization
 - organizational training needs to use and manage recommended systems; and
 - recommendations on system changes/improvements. Recommendations should include interim and long term solutions
 - tiered recommendations that respond to the most urgent systems and knowledge management needs as well as longer term comprehensive platforms
 - recommendations on staffing needed to manage technology, platforms, and software systems as appropriate
- 2) Discussion of assessment findings with Systems Core Team (Director of Finance, Controller, Director of Program Quality, Learning and Compliance, Director of IT, and Senior Advisor to the Executive Director)
- 3) Presentation of findings to the Executive Team
- 4) Final Assessment Report and recommendations

Request for Quotation

Location: The location for the items described is primarily remote/offsite work. Proximity to the DC-area and ability to travel to SC's office in Washington D.C. to attend in-person meetings to present findings preferred.

Taxes and VAT: The SC is a tax-exempted organization. Exemption documentation can be provided to the engaged entity upon request. As such, all prices must be presented exclusive of any taxes, duties, and VAT.

² The consultant will be required to share anonymized interview notes/data sets from their interviews.

Eligibility: By submitting an offer in response to this RFQ, the offeror certifies that it and its principal officers are not debarred, suspended, or otherwise considered ineligible for an award by the U.S. Government. The SC will not award a contract to any entity that is debarred, suspended, or considered to be ineligible by the U.S. Government.

Timeline: October-December 2024

Instructions: Proposals should include the following:

- Summary of qualifications and capabilities in performing the systems assessment
- A proposed methodology for conducting the assessment
- Two professional references for similar work
- Fixed price per deliverable based on the four deliverables listed above
- A proposed timeline outlining the schedule for completion of each deliverable. This should include a precise outline that indicates the timing of processes contributing to each deliverable consistent with the proposed methodology for the work.
- Bios for principals involved in assessment
- Disclosure of any financial or vested interest in any software or technology company. The Solidarity Center prefers independent applicants that are not acting as a representative of any technology or software company nor do they have any financial or vested interest in any such entity.

Questions and Requests for Clarification

Applicants are strongly encouraged to review the RFP in its entirety. Any inquiry, whether relating to the RFP process, administration, deadline, or method of the award, or to the intent or technical aspects of the RFP must be submitted to the SC no later than September 4, 2024, via email at bids@solidaritycenter.org, with the Subject Line: "Systems Assessment - Questions". The SC will not respond to questions received after this date. The SC might elect to compile all received questions and post responses on its website along with the RFP and any addenda.

Interested candidates should submit their application to bids@solidaritycenter.org by 5pm p.m. September 18, 2024.