

## **Questions and Answers for Integrated Systems Assessment – Consultant Services RFP**

- 1. Could you provide a high-level overview of the current systems and products you are using?**
  - a. Answer: The SC has an existing financial management and accounting software that connects to an enterprise resource planning (ERP) software that manages project accounting, a product to manage contracting and payments, and a manual travel expense reporting system. Most other information and processes are conducted manually, often via excel spreadsheets and other similar tracking mechanisms.
- 2. What specific challenges or pain points have you already identified within your current systems and processes?**
  - a. Answer: Challenges include reliance on manual processes, minimal integration, and optimization of existing systems. The SC would be happy to further elaborate with the successful applicant.
- 3. Could you clarify which areas within the assessment scope are of the highest priority?**
  - a. Answer: The SC is keen to learn from the full result of the assessment. In the short term, proposed solutions around grants/awards management, financial management, and program data are of the highest priority.
- 4. Approximately how many stakeholders will be involved in the assessment, and could you provide details about the key participant's roles or departments?**
  - a. Answer: The Systems Core Team (leadership representatives from finance, compliance, IT, and the executive office) will be the key stakeholders. The Systems Core Team has conducted preliminary discussions with staff about the needs and can represent a broad range of feedback. In addition, the assessment should heavily involve staff from the finance, programs, and compliance departments. However, other departments and stakeholders may be identified based on the applicants design and methodology.
- 5. Can you provide any insight into the estimated budget range for this assessment?**
  - a. Answer: The SC appreciates the question. The SC is not able to disclose budget information at this time. The applicant is welcome to provide a few budget options that outline the costs associated with various packages or service offerings.
- 6. Do you anticipate the selected partner will be involved in supporting future modernization activities?**
  - a. Answer: The SC anticipates operationalizing the action oriented assessment recommendations, as relevant and appropriate to its ultimate determination of priorities. Decisions on partner selection will be made at a later date after the

assessment is completed. The SC anticipates conducting a separate procurement as appropriate for any future services.

**7. Are there any specific milestones or deadlines during the October-December assessment period that we should be aware of?**

- a. Answer: The SC anticipates launching this assessment in partnership with the successful applicant in October. The work, including the deliverables outlined in the RFP, should be completed by the end of December 2024. The applicant should propose milestones based on its proposed methodology. However, key milestones will include a project launch meeting, desktop research/reading, interviews, draft assessment report, and presentation of findings.

**8. Are there any specific functionalities or use cases you are particularly interested in exploring within AI tools?**

- a. Answer: The SC is open to learning more about AI tools that support its efficiency and effectiveness goals as outlined in the RFP.

**9. Are there specific compliance standards or security protocols that you expect us to prioritize, particularly with respect to digital security?**

- a. Answer: Under this RFP, the SC is not stipulating alignment with specific compliance standards in regard to digital security, but recommends proposals with a best practices approach.

**10. What is the size and distribution of the team using the various pieces of technology?**

- a. Answer: The Solidarity Center has over 400 employees globally with its headquarters in Washington, D.C. There are 33 field offices in countries in the Americas, Europe, Africa, Middle East and North Africa, and Asia. Approximately two thirds of the organization works in programs. It is safe to assume that the great majority of departments utilize the grants/awards management and financial management systems.

**11. Do you currently have or want systems that will support multi-lingual needs?**

- a. Answer: The SC is interested in learning about the availability of translation systems; however, this is not a critical need at this time.

**12. Is a CRM out of scope for this project or do you not currently use a CRM?**

- a. Answer: The SC does not currently have a CRM.

**13. Do you have any written policies that you can share at this time?**

- a. Answer: The SC will share relevant policies with the successful applicant to inform the desk review phase of the assessment.