

PEAS

Request For Proposal No. PEAS-GL-2024/001

Date of Issuance: **Wednesday 3rd July 2024**
Closing Date for Questions: **Wednesday 17th July 2024**
Closing Date for Submission of Proposal: **Friday 2nd August 2024, at 17:00 BST**

SUBJECT: INVITATION TO BID ON PEAS REQUEST FOR PROPOSAL NO. PEAS-2024.001 ENTITLED

“SMARTOPS: DEVELOPING AN ELECTRONIC SYSTEM THAT INTEGRATES HR, FINANCE AND PROCUREMENT OF PEAS OFFICE AND SCHOOL SYSTEMS”

Dear Sir/ Madam,

You are kindly invited to submit a technical and financial proposal for: **“SmartOps: Developing an electronic system that integrates HR, Finance and Procurement of PEAS Office and School Systems.”** to PEAS (Promoting Equality in African Schools).

Please note that in order for bidders to prepare their proposal, they will need this RfP document as well as the accompanying **[‘Appendices - To be completed by bidders - Appendices- To be completed by bidders - PEAS-GL-2024 001’](#)** Excel document.

Bidders are reminded of the following conditions when preparing their solicitation:

- PEAS intends to issue a Firm Fixed Priced contract for the works described in this RFP, and then pay an ongoing license fee for the running of the system.
- Costs incurred by respondents for the preparation of a proposal and the negotiation of contract are **not** reimbursable.
- PEAS is not bound to accept any of the proposals submitted.
- PEAS reserves the right to accept an bidders proposal without further discussion.
- PEAS will only evaluate proposals from licensed, qualified firms to execute and implement the work under this project.
- The bidders must be able to complete all the works stated in the Statement of Work included this document, or clearly state in Appendices 1 and 2 if they can only provide a selection of the requirements contained herein.
- PEAS reserves the right to award the Contracts that are most advantageous to the Project.

Please note that in submitting a response to this RFP, the Bidder understands and agrees that PEAS and all its associates are not parties to developing proposals.

Anyone can submit questions and inquiries related to this RFP and subscribe to receive responses to all questions using [this form \(https://forms.office.com/e/j13e703CKT\)](https://forms.office.com/e/j13e703CKT). The form must be completed by **Wednesday 17th July 2024**.

In compliance with standard procedure, all questions received before the deadline will be shared with the rest of the bidders along with the responses. **PEAS will determine if questions received after the closing date will be answered or not.**

SUBMISSION GUIDELINES FOR BIDDERS

Only **electronic** submission of responses to this RFP will be permitted. All responses should be submitted via email to tender@peas.org.uk by **Friday 2nd August 2024**, at **17:00 BST**.

The Subject line of the email should read:

'[Your Organisation Name] - SmartOps - Proposal for RFP No. PEAS-GL-2024/001'

- Proposals received after the deadline shall not be evaluated.
- Respondents shall receive an email acknowledging that their Proposal has been received upon its submission.

SUBMISSION INSTRUCTIONS

Proposals must be submitted in English to tender@peas.org.uk by the deadline on **Friday 2nd August 2024**, at **17:00 BST**. Two documents should be submitted with every proposal – a written Proposal (in Word or PDF) and the completed Appendices (1,2,3) [using the Excel template provided \(https://www.peas.org.uk/app/uploads/2024/07/Appendices-To-be-completed-by-bidders-PEAS-2024.001.xlsx\)](https://www.peas.org.uk/app/uploads/2024/07/Appendices-To-be-completed-by-bidders-PEAS-2024.001.xlsx). Full requirements are detailed in 'Evaluation Process' below. The two parts should be attached to the same email, thereby electronically submitting them at the same time.

Modifications to the RFP may be made at any time prior to the Proposal submission deadline.

I would like to thank you for your interest in partnering with PEAS. We look forward to receiving your proposals.

Sincerely,

Richard Aung
COO of PEAS

Statement of Work

“Developing an electronic system that integrates HR, Finance and Procurement of PEAS Office and School Systems”

Introduction

PEAS (Promoting Equality in African Schools) is seeking a cost-effective consolidated HR, Finance and Procurement system – also known as an Enterprise Resource Planning (ERP) system. PEAS is looking for a centralised system that captures and connects key financial and human resource information across the organisation, which currently sit across multiple systems or manual documents. The system will be affordable; easy to use for trained users; configurable to support our current and evolving business needs; and able to easily generate data, reports, graphics, and analyses needed for internal decision making or external reporting.

Background

PEAS (Promoting Equality in African Schools) is a not-for-profit that expands access to inclusive, quality secondary education across Sub-Saharan Africa by running schools and improving the wider education system. PEAS is a registered charity in the UK, Uganda, Zambia and in the process of registering in Ghana with a total headcount of 100 country office staff and 900 teachers. Further information about PEAS’ work and impact can be found on our website - <https://www.peas.org.uk/impact/>.

To carry out our programmatic activities, the vast majority of employees work from country offices or PEAS secondary schools in Uganda, Zambia and Ghana. PEAS has a smaller team based in London, UK, who provide technical assistance to country offices, lead on fundraising and lead on overall governance functions. Most financial transactions occur in Africa and are executed within the countries where we work in the various local currencies, which are subsequently converted to U.K. pounds for final accounting. Internet bandwidth varies widely across the various PEAS offices and schools.

PEAS has an enduring focus on value-for-money across all our areas of work, which is essential to ensuring our best practice and approaches can be replicated and scaled within the government system. External evaluations have shown that PEAS provides a higher quality education at lower cost than comparable schools, and PEAS was highlighted in a Girls’ Education Challenge spotlight brief for demonstrating very strong value for money, offering education provision at 27% lower than the government equivalent. This has been achieved through consistently looking for cost-effective approaches to delivering our work, including ensuring any operational systems are procured at an economical cost which can be sustained for the long-term, without compromising the equity or quality of our work.

PEAS is mostly funded through competitively-awarded grants and cooperative agreements, from a mixture of institutions, trusts, foundations, corporates and individuals across the UK, US and other countries. PEAS has been the recipient of awards from FCDO and USAID, which require highly effective financial and operations systems.

Current Systems

PEAS currently uses the following systems that have a bearing on this project:

Accounting:

- PEAS’ country offices and schools in Africa use QuickBooks via desktop apps, with only manual exporting and sharing of data. The UK office use Xero. We intend to migrate away from these systems onto the new integrated system, if possible.

- PEAS also uses Xero for expenses.
- Management accounts are currently produced in Excel.

Procurement:

- Currently, all procurement activities are conducted manually using customised Word or Excel templates in each country, with communication to vendors taking place via email.

Financial Planning, Forecasting and Projecting Income:

- Every year, each country office develops their annual budgets using tailored Excel templates, which break down planned expenditure by department and include Chart of Accounts accounting codes.
- PEAS does use Salesforce for the purpose of projecting income based on probability, and as a Customer Relationship Management tool for storing and tracking donor engagement.

HR Systems:

- PEAS currently uses the Breathe HR system for storing of staff information in the UK and Zambia specifically, however this is still captured and stored manually in Uganda and Ghana.
- All other HR processes are conducted manually (including annual performance management and appraisals, recruitment, staff contract management, etc.) using customised Word or Excel templates in each country, with limited flow of data.

Other Systems:

- All PEAS teams use the Microsoft products, including Office 365, Sharepoint and Forms.
- Files are stored, managed, and shared internally using Microsoft SharePoint and we use Microsoft Outlook and Teams for emails, chats, calendars, etc.
- PEAS staff generally use laptops, with Microsoft Windows 10 or 11 operating systems.
- PEAS' country offices generally have stable bandwidth, however there have been recent challenges with regular loadshedding in Zambia as well as connectivity challenges across the continent, therefore locally hosted or bandwidth-light applications are desirable.
- Currently sign-offs / approvals are done manually, which is hugely challenging given many key signatories are travelling in the field most of the time.

Motivation for switching to a new system

PEAS has several important motivations for switching to a new system that integrates HR, Finance and Procurement. These include:

- Automate a vast range of processes which are currently manual, to increase data integrity and reduce the risk of human-error, address frustrations around repetitive data entry, ensure staff can redirect their time to higher impact activities and ensuring there is only one golden source of data (thereby reducing time required to reconcile similar data from multiple sources);
- More robust financial analysis capabilities, such as the ability to code and report on financial data in a variety of ways and with multiple dimensions;
- Greater connectivity and automatic sharing of data across operational areas, supporting real-time decision-making and analysis;
- Faster decision-making and sign-off of activities, to reduce frustrations and delays across the organisation;
- Ability for staff members to self-serve and independently run a wide variety of reports based on real-time information, reducing dependency on colleagues for external reporting;
- Easier access to systems for staff connecting from a variety of office and home locations with varying internet bandwidth in the U.S. and across Sub-Saharan Africa;
- Greater transparency for programme teams on project budgeting and burn-rates, to support effective programme delivery;

- Digitising all processes to ensure effective environmentally-friendly record keeping, reducing the need to print and store physical documents.

Requirements / Scope of Work

1. **Project overview:** We are seeking a cost-effective HR, Finance and Procurement system (also known as an ERP system) in order to integrate and digitise many of the current operational processes performed manually or by multiple separate systems. The system must be affordable in the long-term; easy to use for trained users; configurable to support our current and evolving business needs; and able to easily generate data, reports, graphics, and analyses needed for internal decision making or external reporting. We understand that it may be more cost effective to select several systems which are specialised in different functionality, however these systems must have stable and well-supported integrations with one another. We anticipate selecting a system no later than September 2024 and plan to spend the following 3-6 months to configure, set up, test, train users, and load data into the new system. We may decide to phase roll-out at different levels, for example at global, country office and school level, or rolling out specific type of functionality in phases.
2. **Expected number of users:** Subject to further updates, our estimate is that the system would be used by approximately 252 users, broken down as follows:
 - a. PEAS Global team - based in London, Kampala, Lusaka and working remotely: 19 staff who will use the system for submitting or processing requests, approximately 7 of whom will require administrative / higher privileges for conducting operational or management functionalities.
 - b. PEAS Country Offices – our country teams based in offices or working remotely in Uganda, Zambia and Ghana: total of 81 staff (53 staff in Uganda, 25 staff in Zambia, 3 staff in Ghana) who will use the system for submitting or processing requests. Approximately 18 of these staff members will require administrative / higher privileges for conducting operational or management functionalities.
 - c. PEAS Schools – we expect that 3-4 staff members at each PEAS school will need to regularly use the system: total of 152 school staff (30 schools in Uganda, and 8 schools in Zambia by January 2025) who will use the system for submitting or processing requests, approximately 76 of whom will require administrative / higher privileges for conducting operational or management functionalities.

Throughout the life of the system, the number of staff using the system will change as our programmes grow or shift – therefore the successful vendor’s licensing approach and cost proposal will take this into account.

3. **Legacy integrations:** The selected system will need to efficiently import data from our existing QuickBooks and Xero financial systems. In addition, we will want to import information related to staff from Breathe and existing Excel spreadsheets. These are major requirements, and we will need to carefully understand your technical approach to importing and integrating this type of data.
4. **Invoicing and Reporting:** The new system needs to generate a variety of standardised financial reports for use by project managers, department/country leaders, senior leaders, internal and external auditors, and donors funding our work. See Appendix 1 for a listing of typical reports that system needs to generate. As well as standard budget-to-actual reports by object class, we will be looking for the capability to run special financial reports to show spending by program areas and by geographic areas.
5. **Customisation:** We anticipate having to customize the new system to account for our workflows, compliance, required reports, types of funding sources, etc. However, we appreciate extensive customisation has its own risks and costs. Therefore, to the extent that an “out of the box” system which requires less customisation can meet our needs or is extremely easy for end users to tailor, that will be preferable to a system that require massive customization or large effort by software programmers.

Bidders must describe your approach as to how the customisation of the system’s data fields, workflows, and reporting capabilities will be accomplished and how much effort on your part is included in your base price.

6. IT requirements:
 - a. The new system will be provided and maintained by the vendor as software as a service. Please specify where the software will be hosted, who operates those servers, and warranties offered as to the safety and security of our data as well as the reliability and availability of the software service.
 - b. Discuss your approach for planned downtimes for maintenance, bug fixes, and upgrades and describe your service level agreement for response times to problems you identify or ones we identify. Address how often your system is upgraded to add new features and how that is handled for your clients, including training on new features.
 - c. As available bandwidth and availability of internet can be variable across different locations in Sub-Saharan Africa, note that the ideal system will offer some limited functionality whilst offline (for example, data entry or limited reporting) and then syncing up of data when the device is connected to the internet. Specify the minimum bandwidth required to load the system for “acceptable” use and the higher bandwidth for “optimal” use.
 - d. The ideal system will allow approvals of transactions to be given via common mobile devices, such as phones and tablets.
 - e. We require that our data is protected and available at all times, 24/7. Discuss how our data and documents in the new system are backed up, to where, and how easily and quickly data or files can be retrieved from a backup location if the primary location is offline or breached. Discuss your security approach to prevent ransomware, viruses, and other malware. Discuss whether your company’s systems, including all instances used by your clients, have ever been victimized by malware and what you learned from these experiences.
7. Functional requirements: See Appendix 2 in [the separate Excel](#) for a list of the essential and desirable functions we require the new system to perform.
8. Initial and ongoing training, support, tools and resources: Describe how you will work with us during the initial set up and testing phase, and thereafter, including support for version upgrades that you deploy to all clients. What training resources do you provide? Documentation? Video instruction? Do you have a live help desk; if so, what are the hours of operation? How many staff provide support? What is the typical waiting time for customer assistance? Do you have a user community forum online? Is all support included in the costs, or does it ever require additional payment? How is this costed?
9. Warranty & liability: Provide a copy of your warranty and liability coverage, including all client benefits and any limitations.
10. Financial proposal and pricing approach: Alongside the written proposal, we are requesting bidders to submit a financial proposal in Appendix 3 in [the separate Excel document](#). This financial proposal should be prepared based on the bidders understanding of PEAS’ requirements from this RfP – however we recognise that minor changes made be made as detailed negotiations with shortlisted bidders takes place. Please note that, although we are not able to provide a specific budget ceiling at this stage, PEAS is a non-profit organisation focused on cost-effectiveness and therefore we will be looking for a fairly low-cost product which can be sustained for the long-term. It would also be helpful to understand your pricing approach, including answers to questions noted below in the Evaluation Process section.

Evaluation Process

Interested firms should submit a proposal containing the information requested in this RFP. A cross-functional committee will review all proposals and develop a short list of firms/systems. Short-listed firms will be contacted and invited to demonstrate their system for the committee during a lengthy meeting that will allow ample time to showcase system features and respond to questions. After demonstrations, the most competitive firms will be asked to submit a pricing proposal and any supplemental information.

If you have questions or seek clarification about information in this RFP, please submit them using [this form](https://forms.office.com/e/j13e703CKT) (<https://forms.office.com/e/j13e703CKT>) by **Wednesday 17th July 2024**. If you would like to receive PEAS' responses to all submitted questions, please provide your contact details via the [same form](https://forms.office.com/e/j13e703CKT) (<https://forms.office.com/e/j13e703CKT>) by **Wednesday 17th July 2024**.

All proposals will be evaluated against the following Evaluation Criteria, which are listed in descending importance, starting with the most important:

1. Price (pricing approach initially evaluated; actual costs to PEAS subsequently solicited and evaluated for short-listed providers) and availability of NGO pricing
2. Functionality of the system without customization
3. Additional desired functionality with customization
4. Reliability, maintainability, servicing, security
5. Your firm and past performance with international NGOs or other similar clients

Each proposal must contain the items listed in the Submission Requirements table below or otherwise requested in this RFP. Please submit your information in the order below.

Evaluation Criteria	Submission Requirements	Weighting
Financial Proposal and Pricing Approach	<ul style="list-style-type: none"> • Please submit a financial proposal using either the suggested template or the bidder's preferred template in Appendix 3 within the accompanied Excel document. This financial proposal should include any costs required for initial system set-up, as well as any ongoing fee or running costs once the system is operational. Note that the supplier is expected to provide all their own equipment for executing the assignment. • Within the proposal, also please indicate: <ul style="list-style-type: none"> ▪ How are one-time or annual fees determined? ▪ Can prices increase over time and if so, based on what? ▪ Do you charge a fee while we are setting up, but not using, the new system? ▪ If you charge based on the number of users of the system, will you differentiate between core users of the system and other employees who will only submit or review timesheets? ▪ Will you offer us discounted rate as a non-profit organization serving the public good? How is this priced? 	20%
Functionality of the system without customization	<ul style="list-style-type: none"> • The extent to which your system has the data fields and capabilities required to produce the reports listed in Appendix 1 (see separate Excel document and indicate compliance with each requirement as guided in the document). 	30%

	<ul style="list-style-type: none"> • The extent to which your system will meet or exceed each of the functional requirements listed in Appendix 2 (see separate Excel document and indicate compliance with each requirement as guided in the document). • Carefully explain your system’s integration capabilities at a generic level, as well as a detailed level for Microsoft 365 products. • If your system will only provide one category of functionality and would require integration with other systems to provide other categories of functionality, please indicate the out-of-the-box integrations with such systems (e.g. if your system only provides HR functionality, please indicate which Finance / Procurement systems your system has developed well-tested integrations with). 	
Additional desired functionality with customization	<ul style="list-style-type: none"> • Propose how additional functionality could be added and how that process works. For example, does it depend on whether you choose to add the feature for all of your clients in a software update or can the enhancement be made immediately just for us? • How do you notify, and prepare clients for, additional enhancements to the new consolidated system? • How are any new or bespoke functionality additions priced? 	
Reliability, maintainability, servicing, security	<ul style="list-style-type: none"> • Please address the requirements included in Section 6 of Requirements, “IT Requirements”, above. • Summarize your Warranty and Liability requirements and provide the text of your proposed terms. 	20%
Your firm and past performance with international NGOs or similar clients	<ul style="list-style-type: none"> • Provide general information about your firm (can be written and/or a short video) so we can assess your technical and business expertise, longevity, stability, financial position, and future prospects in the marketplace. • Provide references for at least three (3) clients for whom you have provided similar services, preferably including international NGOs. For each reference, include a contact name, title, phone number, and email address at a minimum. 	15%
Project Management Approach, Timeline & Training approach	<ul style="list-style-type: none"> • Describe your staffing and approach to partnering with us on ERP implementation, including a summary of key staff, roles and qualifications (1 page CVs for up to 4 key staff) • Describe the phases of the process and whether you offer this as a direct service or whether we have to retain a third party to assist us in product implementation. • Include brief biographies of key personnel who would work with us on this project. If included as a direct service, please describe your project management approach and the expected role of PEAS during implementation. • Note typical timeframes for system set-up, customization, data loading, testing, and training, and a GANTT chart detailing the 	15%

	<p>sequence of tasks to accomplish the statement of works required.</p> <ul style="list-style-type: none"> • Please address the training questions in Section 8 of Requirements, “Initial and ongoing training, support, tools and resources”, above. 	
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Completed submission packages must be delivered electronically to the email address noted under ‘Submission Instructions’ at the start of this RfP. Receipt of proposals will be confirmed via email. The deadline for submission is as stated on page 1. We reserve the right to not consider any late submission.

Ethical values and PEAS’ values

One of PEAS’ values it be honest, which includes a commitment to act with integrity and to never receive bribes, Specifically, our procurement processes are fair and open and allow all vendors or consultants equal opportunity to win our business. We will not tolerate fraud or corruption, including kickbacks, bribes, undisclosed familial or close personal relationships between vendors and PEAS employees, or other unethical practices. If you experience or suspect unethical behaviour by a PEAS employee, please our Whistleblowing Email at reporting@peas.org.uk. Any vendor or consultant who attempts to engage, or engages, in corrupt practices will have their bid disqualified and will not be solicited for future work.