



YMCA of Greater Houston

Request for Proposal

RFP 22-01: eProcurement Solution and Implementation Services

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I. Introduction and Information for Vendors

The YMCA of Greater Houston (the “YMCA”) is a 501c3 non-profit organization dedicated to improving the quality of life through programs which promote healthy living, youth development and social responsibility. The YMCA in the greater Houston area includes operations in over 20 facilities with fitness, sports and aquatic programming; nearly 200 local schools providing before and after school care for children; 9 preschools and early care programs; one resident camp in Trinity, Texas; and various caring community sites, providing various outreach services to meet the needs of community including but not limited to food distribution and pantry services, youth enrichment activities and social service programs. The YMCA also provides programming for senior citizens, teens, and populations with special needs. Finally, through YMCA International Services, the YMCA provides assistance to refugees and immigrants during their resettlement journey in the form of legal assistance, employee development and training, and childcare assistance via federal funds restricted for these purposes.

II. Statement of Request

The YMCA is seeking solutions for a new E-Procurement Software Solution to replace current system. Our current purchasing system is Baseware and is integrated with our current accounting system, SGA. Our timekeeping and HR system is Kronos (UKG). The YMCA is seeking an eProcurement solution that more closely meets the needs of the YMCA’s Procurement requirements and shift in current processes.

Overall, the YMCA seeks a robust, highly flexible system that is cost-effective, scalable, configurable, and easy-to-use and manage, along with not requiring a great deal of customization.

III. SCOPE OF WORK

The eProcurement Solution shall provide the following functionality:

1. Supplier Self-Service provides internet-based supplier access to view/submit invoices, submit changes to their profile, and view solicitations issued by the YMCA of Greater Houston.
2. Requisition Processing - Creation and tracking of new purchase requests or revised requests the solution shall support supplier selection, product description and/or service identification, pricing and accounting detail. Revision or change requisition process must also be supported.
3. Purchase Order Processing – Creation, tracking and management of purchase orders placed for goods/services. The purchase order encumbers funds to be spent and establishes purchase commitments related to supplier, product, quantity, cost and terms. The solution shall support order history, blank purchase orders, receiving, purchase order closeout, change orders and subsequent reporting.

4. Receiving Management – Maintains all Receiving transactions of goods received against a purchase order.
5. Solicitation Management involves the tracking of activities and information related to the procurement solicitation process. Qualifying requisitions that require competitive bidding shall be processed through predefined steps. The solution shall support request document creation, responding tracking, solicitation/diversity, goal tracking, solicitation review process, cost tracking and solicitation document management.
6. Contract Management maintains a centralized view of all vendor contracts to ensure compliance with contract terms and conditions. Provides administration of contract details and integrates with Purchase Requisitions and Purchase Orders. Monitoring and notification of contract expirations/renewals, contract expenditures and other key contract details. The solution shall provide appropriate tracking information, audit logs tracking all changes to the contract, manage contract and sub-contract details, provide contract cost controls, robust contract reporting tools.
7. Employee Travel and Expense Management for a centralized module to manage and track approved business related expenses. Mileage tracker functionality and app based submissions are desired.
8. Purchasing Card management for nontraditional spending and gain visibility through the chosen system.

IT Requests

1. SAML Authentication (Single Sign On)
2. Chrome browser compatibility without use of plug-ins
3. Microsoft Multi Factor Authentication
4. User File Integration

Implementation Services:

It is imperative that a business system implementation of this magnitude be properly planned, configured, tested and implemented so that the YMCA of Greater Houston can maintain its high productivity levels. Therefore, the implementation services are a key aspect to a successful project. The Proposer should detail the implementation services that they provide to effectively configure, test, train and implement a software solution of this scale. Each service provided should include details about what the service covers, an estimated amount of time and cost of these services, as well as the level of participation that is needed by YMCA of Greater Houston staff members. Additional reference to the type of information gathered in each stage of service is helpful for the YMCA of Greater Houston to understand what is needed.

Services to be included but are not limited to the following:

- a. Configuration Requirement Assessment Detailed review and requirement gathering of business processes and needs to confirm understanding of the YMCA of Greater Houston's needs. This information will be used to define software configuration requirements, identify gaps of functionality and identified resolutions to those gaps.
- b. Project Management Proposer should provide an overview of their Project Management methodology and processes used to manage projects of this scale. The YMCA of Greater Houston will assign a designated internal YMCA of Greater Houston staff member to work in conjunction with the Contractor.
- c. Organizational Change Management in conjunction with an effective Project Management methodology, organizational change management is also a key consideration. The Proposer should provide an overview of methods used to guide an organization through managing complex changes. The Proposer should provide information about services available to evaluate, develop and test process changes as well as address documentation and post change evaluations.
- d. Implementation Services Proposer is asked to provide information related to implementation approach as well as provide any recommendations related to methods for implementing a large-scale solution. Additionally, if added support for implementation activities is recommended, inclusion of the purpose and estimated cost should be included.
- e. Integration Services Module interfaces are a crucial component to the overall solution effectiveness and should be included as appropriate. In addition to integrations within the Proposer's software solution, integration with external, 3rd party partner solutions must also be addressed. The Proposer should indicate what Integration Services are included and the cost of those integrations.

f. Configuration Management Proposer should provide details on the Configuration Management processes used to catalog and manage the system requirements, functional attributes and associated configuration/setup required during implementation. Proposer is asked to provide information related to the services to support the actual configuration of the system as well as manage the configuration catalog as part of the solution.

g. Data Migration Proposer is asked to provide the process they will employ to convert data from the existing ERP solution into the new ERP system. Please indicate what activities the YMCA of Greater Houston staff is expected to complete and those activities that the Provider addresses.

h. Testing Proposer should provide recommended testing and validation processes and recommended timing as well as review of test plans and scripts. Please indicate what activities the YMCA of Greater Houston staff is expected to complete and those activities that the Provider addresses.

i. Training Proposer should provide a recommendation for comprehensive training. Training should include but not be limited to: System Administration, Configuration, Super/Power User training and general use training. Please indicate if training is done onsite, online or at Proposer's site. Additionally, a description of courses available should be included. Please indicate any areas where the YMCA of Greater Houston would be responsible for training as opposed to be provided by the Proposer.

Post Support and Maintenance

It is necessary for the YMCA of Greater Houston to understand the Proposer's strategy for ongoing development of the proposed products. The Proposer should include information on the frequency of software releases of both Major and Minor release schedules as well as how new features are identified for inclusion in future releases. Please provide details how security and software fixes are addressed when outside the standard release cycle. The Proposer is expected to provide detail of services provided post-support, as well as the cost structure of those services. If services vary by software delivery models, include details related with each model. If any services are optional, please indicate which those are and the associated costs. To ensure proper support and coverage of the ERP solution, please indicate what roles and responsibilities are included in the identified services and indicate what expectations of support roles would be covered by the YMCA of Greater Houston team. In addition to the post-support services, the Proposer should also include the standard Service Level Agreements that are used to measure service of both support and system hosting (if appropriate).

IV. Proposal Submission Instructions

Please complete the following documents and submit each in PDF format (accompanied by any applicable attachments):

DOCUMENT 1 – Partner Responses

DOCUMENT 2 – Disclosure of Potential Conflict of Interest

DOCUMENT 3 – Certification Regarding Debarment, Suspension and Other Responsibilities

To be eligible for consideration, please submit your proposal as follows:

Method: via e-mail
Jason Eldred
Purchasing Manager
jason.eldred@ymcahouston.org

Due Date: Friday, June 24, 2022
5:00 PM CST

Proposals received after this time will not be considered. Amendments or additional information will not be accepted after the submission deadline unless requested by the YMCA.

The proposal must be submitted with “Proposal for Services” included in the subject line of the email. An accompanying transmittal letter must be signed by an individual authorized to contractually bind the submitting firm, and must indicate that the proposal is valid for 180 days from the submission date. It must also state full agreement with the conditions and requirements included herein, and give full contact information for questions regarding the proposal.

There is no limit to the physical size of the proposal, but a complete yet succinct, and unambiguous presentation is expected. Proposals should provide a clear and straightforward description to enable the YMCA to evaluate the proposal with little to no follow-up clarification needed.

Withdrawal of proposals will be accepted up to the date and time of submission noted above, and should be submitted via the same method described above.

Any organization submitting a proposal is deemed to have read, understood and agreed to all terms, conditions, and requirements set forth in this RFP.

The selection may be made on the basis of the proposals as initially submitted, without discussion, clarification or modifications. The YMCA reserves the right to request further information as needed. The YMCA reserves the right to enter into negotiations for terms as part of the evaluation.

The YMCA will select a partner based on the responses provided. Award will not be made based solely on any one element of the proposal, but instead based on the most responsive and advantageous proposal submitted.

V. Proposal Selection Timeline

The timeline for award is as follows:

RFP Available to Public – Posted on YMCA Website	June 10, 2022
Partner Proposals Due via Email	June 24, 2022
Evaluations	June 27th – 30th, 2022
Anticipated Contract Award Date	Week of July 4th, 2022