



**Request for Proposals**

**Title: Global HR Systems and Processes Assessment and Roadmap**

**RFP No: RFP-CI-CIPO-FY23\_001**

**Date of Issuance: 25 May 2022**

**1. Background**

Since 1987, Conservation International has worked to spotlight and secure the critical benefits that nature provides to humanity. Combining fieldwork with innovations in science, policy and finance, we’ve helped protect more than 6 million square kilometers (2.3 million square miles) of land and sea across more than 70 countries. With its global office based in Arlington VA, CI has offices in 30 countries and over 1300 staff.

CI has set goals and projects which call for a growing global workforce, along with plans to open more offices starting with locations in Africa and Europe. To meet these initiatives and support a full employee life cycle, CIPO plans to implement a Global Service Delivery Model that can support the expected growth in workforce, coupled with an improved infrastructure, to deliver best in class global HR Programs and Services.

**Countries**

| Country   | Staff Count | Country    | Staff Count | Country       | Staff Count | Country      | Staff Count |
|-----------|-------------|------------|-------------|---------------|-------------|--------------|-------------|
| Australia | 6           | Colombia   | 40          | Japan         | 8           | Peru         | 46          |
| Belgium   | 13          | Costa Rica | 10          | Kenya         | 26          | Philippines  | 28          |
| Bolivia   | 18          | Ecuador    | 43          | Liberia       | 13          | Samoa        | 4           |
| Botswana  | 5->80       | Fiji       | 17          | Madagascar    | 115         | Singapore    | 25          |
| Brazil    | 72          | Germany    | <10         | Mexico        | 30          | South Africa | 94          |
| Cambodia  | 42          | Guyana     | 28          | New Caledonia | 4           | Suriname     | 17          |
| China     | 12          | Indonesia  | 100         | New Zealand   | 7           | Timor Leste  | 21          |
|           |             |            |             |               |             | US           | 325         |

The following business priorities have been identified as critical to CI’s success and for which technology upgrades/enhancements may be required in addition to policy and business process developments.

1. Manage a global employee life cycle, from recruiting/applicant stage through retirement/termination
2. Effectively implement, evaluate, and communicate core HR functions
3. Support effective learning and development efforts globally
4. Provide timely, relevant HR metrics and data and workforce planning tools
5. Recruit, onboard and retain high-performing staff
6. Foster a culture of inclusion, diversity, and connectivity for CI’s 30 country programs and 70+ other countries where CI engages through local partners
7. Manage risk in an increasingly complex regulatory and security environment
8. Effectively integrate core HR workforce data across operations and CI-systems, including Payroll, Finance, and IT, to improve employee experience, operations efficiency, and robust reporting and metrics CI-wide
9. Provide consolidated data from all HR functions in a dashboard to allow for complete and accurate strategic and managerial decision making
10. Deploy innovative HR solutions to our multi-language, multi-cultural workforce

## 2. Project Overview

HR's current technical infrastructure has challenges in responding efficiently and effectively to meet our current and future organizational goals. Therefore, we are soliciting a consultant/firm to conduct analysis of our HRIS business processes and technology systems and provide a technical roadmap based upon findings.

As CI's global programs expand and diversify to meet the challenges facing our planet, CI People Operations (HR) is interested in optimizing business processes and systems to meet the growing organizational needs. We seek a thorough review of our processes, technology needs, current state and pain points, and a recommended roadmap to improve our technology infrastructure.

This project is sponsored jointly by IT and CI People Operations (CIPO-formerly HR) department. We expect the consultant/firm to work with key stakeholders from CIPO as well as related departments and select field offices to gain an accurate picture of the needs and limitations of the current process and systems.

Business Processes in scope for this engagement include:

- RECRUITMENT: Application Tracking, Background Checks/Screening, and Onboarding
- CORE HR Functions: hiring, status and salary changes, terminations
- TALENT: Employee Performance Management and Annual Merit
- GOALS: Organizational and Individual Goals Management
- POSITIONS: Job Description Management and Position Registers/Standard JD Library
- L&D: Learning and Development, Talent mapping

## 3. Terms of Reference, Deliverables and Deliverables Schedule

The objectives of this project are to:

- Meet with HR project leads as well as identified key field offices or hubs individually or in groups to gather and validate information on current HR business processes and systems, business needs, and areas of concern. For more information on CI global offices: <https://www.conservation.org/about/global-offices>
- Document current state of HR's systems, tools, and data management, identifying areas of risk, redundancies, and inefficiencies.
- Document current HR workflow and processes identifying pain points and opportunities, both in US and field offices, for areas in scope.
- Make recommendations on updates or implementation of HR systems to meet organizational needs globally.
- Describe current and future state integrations with other CI Systems.
- Define a technology roadmap to transition to updated HRIS enterprise-wide system from current state.
- Provide high-level estimate of cost of technology and implementation transition.

Consideration should be given to opportunities within CI's current HRIS Ecosystem as well as Global CIPO/Local HR role, responsibilities, and structure.



The following deliverables are anticipated for this engagement, with a desire to have the project completed by mid-October, 2022:

| <b>Deliverable</b>  |
|---|
| Gather and document global HR processes following a typical employee lifecycle.<br>Document HRIS challenges, pain points, and opportunities       |
| Assess Current State HR technology and Integrations   |
| Recommended Future HRIS System Architecture, System of Record, and Integration Points with other CI Systems, and overall technical infrastructure |
| Recommend digital transformation roadmap (3 – 5 years) informed by IT’s technical roadmap   |
| Provide <a href="#">template</a> and information to draft RFP, identify vendors to distribute RFP   |

CI will provide requested documentation on organization structure, list of key stakeholders and roles, business process, and technical infrastructure. CI staff will make themselves available for interviews and deliverable reviews.

**4. Submission Details**

- a. Deadline. Proposals must be received no later than June 24, 2022 9:00 PM Eastern Time. Late submissions will not be accepted. Proposals must be submitted via email to [itcommunications@conservation.org](mailto:itcommunications@conservation.org). All proposals are to be submitted following the guidelines listed in this RFP.
- b. Validity of bid. 120 days from the submission deadline
- c. Clarifications. Questions may be submitted to [itcommunications@conservation.org](mailto:itcommunications@conservation.org) by the specified date and time in the timeline below. The subject of the email must contain the RFP number and title of the RFP. CI will respond in writing to submitted clarifications by the date specified in the timeline below. Responses to questions that may be of common interest to all bidders will be posted to the CI website and/or communicated via email.
- d. Amendments. At any time prior to the deadline for submission of proposals, CI may, for any reason, modify the RFP documents by amendment which will be posted to the CI website and/or communicated via email.

**5. Minimum Requirements**

- a. Direct experience performing similar work at international organizations
- b. Direct experience advising clients with international offices.
- c. Expertise gathering requirements from technical and non-technical users
- d. Provide recommendations for all potential IT platforms and are not exclusively aligned to a specific software vendor(s)

**6. Proposal Documents to Include**

- a. Signed cover page on bidder’s letterhead with the bidder’s contact information.
- b. Signed Representation of Transparency, Integrity, Environmental and Social Responsibility (Attachment 1)
- c. Technical Proposal.

- i. Corporate Capabilities, Experience, Past Performance, and 3 client references. Please include descriptions of similar projects or assignments and at least three client references.
  - ii. Qualifications of Key Personnel. Please attach CVs that demonstrate how the team proposed meets the minimum requirements listed in section 5 (Minimum Requirements).
  - iii. Technical Approach, Methodology and Detailed Work Plan. The Technical Proposal should describe in detail how the bidder intends to carry out the requirements described in the Terms of Reference (Section 3)
  - iv. Integration and Alignment, address how to approach coordination with the implementor for the CI [IT global assessment](#) RFP project
- d. Financial Proposal. Offerors shall use the cost proposal template (Attachment 2).

**7. Evaluation Criteria** In evaluating proposals, CI will seek the best value for money considering the merits of the technical and costs proposals. Proposals will be evaluated using the following criteria:

| <b>Evaluation Criteria</b>  | <b>Score (out of 100)</b> |
|---|---------------------------|
| Methodology: Is the proposed approach and methodology appropriate to the assignment and practical in the prevailing project circumstances?  | 25%                       |
| Workplan and Timing: Is the presentation clear and is the proposed workplan logical, realistic and inclusive of our requirements? Estimated time for completion of the project  | 35%                       |
| References and Qualifications: Does the bidder's past performance demonstrate recent proven experience doing similar work with 3 references? Qualifications of proposed personnel and specific technical expertise appropriate for the assignment | 20%                       |
| Cost: Costs proposed are reasonable and realistic, reflect a solid understanding of the assignment <a href="#">Budget Template</a>  | 10%                       |
| Alignment: An overall approach working in alignment with <a href="#">CI-IT RFP</a> and CI's technical infrastructure (proposed IT roadmap as a result of RFP)   | 10%                       |

**8. Proposal Timeline**

|  |                        |
|--|------------------------|
| RFP Issued   | May 25, 2022           |
| Questions submitted to CI                              | June 3, 2022           |
| Responses to questions submitted to CI are distributed | June 8, 2022           |
| Complete proposals due to CI                           | June 24, 2022          |
| Internal Reviews and Vendor Reference checks           | June 25 – July 19 2022 |
| Final selection  | August 1, 2022         |

**9. Resulting Award** CI anticipates entering into an agreement with the selected bidder by 15 August 2022. Any resulting agreement will be subject to the terms and conditions of CI's Services Agreement. A model form of agreement can be provided upon request.

The Selected Bidder will be expected to sign our standard Mutual Confidentiality agreement (Attachment 1). If access is requested to CI systems, consultants/firms will be required to complete our Vendor Security Management Questionnaire and sign our acceptable use policy.



This RFP does not obligate CI to execute a contract, nor does it commit CI to pay any costs incurred in the preparation or submission of the proposals. Furthermore, CI reserves the right to reject any and all offers, if such action is considered to be in the best interest of CI. CI will, in its sole discretion, select the winning proposal and is not obligated to share individual evaluation results.

**10. Confidentiality** All proprietary information provided by the bidder shall be treated as confidential and will not be shared with potential or actual applicants during the solicitation process. This includes but is not limited to price quotations, cost proposals and technical proposals. CI may, but is not obliged to, post procurement awards on its public website after the solicitation process has concluded, and the contract has been awarded. CI's evaluation results are confidential and applicant scoring will not be shared among bidders.

**11. Code of Ethics** All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics. Conservation International's reputation derives from our commitment to our values: Integrity, Respect, Courage, Optimism, Passion and Teamwork. CI's Code of Ethics (the "Code") provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violation of the Code of Ethics, as well as concerns regarding the integrity of the procurement process and documents should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

**12. Attachments:**

Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility  
Attachment 2: Cost Proposal Template





**Attachment 1: Representation of Transparency, Integrity, Environmental and Social Responsibility**

All Offerors are expected to exercise the highest standards of conduct in preparing, submitting and if selected, eventually carrying out the specified work in accordance with CI's Code of Ethics. CI's Code of Ethics provides guidance to CI employees, service providers, experts, interns, and volunteers in living CI's core values, and outlines minimum standards for ethical conduct which all parties must adhere to. Any violations of the Code of Ethics should be reported to CI via its Ethics Hotline at [www.ci.ethicspoint.com](http://www.ci.ethicspoint.com).

CI relies on the personal integrity, good judgment and common sense of all third parties acting on behalf, or providing services to the organization, to deal with issues not expressly addressed by the Code or as noted below.

**I. With respect to CI's Code of Ethics, we certify:**

- a. We understand and accept that CI, its contractual partners, grantees and other parties with whom we work are expected to commit to the highest standards of Transparency, Fairness, and Integrity in procurement.

**II. With respect to social and environmental standards, we certify:**

- a. We are committed to high standards of ethics and integrity and compliance with all applicable laws across our operations, including prohibition of actions that facilitate trafficking in persons, child labor, forced labor, sexual abuse, exploitation or harassment. We respect internationally proclaimed human rights and take no action that contributes to the infringement of human rights. We protect those who are most vulnerable to infringements of their rights and the ecosystems that sustain them.
- b. We fully respect and enforce the environmental and social standards recognized by the international community, including the fundamental conventions of International Labour Organization (ILO) and international conventions for the protection of the environment, in line with the laws and regulations applicable to the country where the contract is to be performed.

**III. With respect to our eligibility and professional conduct, we certify:**

- a. We are not and none of our affiliates [members, employees, contractors, subcontractors, and consultants] are in a state of bankruptcy, liquidation, legal settlement, termination of activity, or guilty of grave professional misconduct as determined by a regulatory body responsible for licensing and/or regulating the offeror's business
- b. We have not and will not engage in criminal or fraudulent acts. By a final judgment, we were not convicted in the last five years for offenses such as fraud or corruption, money laundering or professional misconduct.
- c. We are/were not involved in writing or recommending the terms of reference for this solicitation document.
- d. We have not engaged in any collusion or price fixing with other offerors.
- e. We have not made promises, offers, or grants, directly or indirectly to any CI employees involved in this procurement, or to any government official in relation to the contract to be performed, with the intention of unduly influencing a decision or receiving an improper advantage.
- f. We have taken no action nor will we take any action to limit or restrict access of other companies, organizations or individuals to participate in the competitive bidding process launched by CI.



- g.** We have fulfilled our obligations relating to the payment of social security contributions or taxes in accordance with the legal provisions of the country where the contract is to be performed.
- h.** We have not provided, and will take all reasonable steps to ensure that we do not and will not knowingly provide, material support or resources to any individual or entity that commits, attempts to commit, advocates, facilitates, or participates in terrorist acts, or has committed, attempted to commit, facilitate, or participated in terrorist acts, and we are compliant with all applicable Counter-Terrorist Financing and Anti-Money Laundering laws (including USA Patriot Act and U.S. Executive Order 13224).
- i.** We certify that neither we nor our directors, officers, key employees or beneficial owners are included in any list of financial or economic sanctions, debarment or suspension adopted by the United States, United Nations, the European Union, the World Bank, or General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement programs in accordance with E.O.s 12549 and 12689, "Debarment and Suspension".

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



**Attachment 2: Cost Proposal Template**

The cost proposal must be all-inclusive of profit, fees or taxes. Additional costs cannot be included after award, and revisions to proposed costs may not be made after submission unless expressly requested by CI should the offerors proposal be accepted. Nevertheless, for the purpose of the proposal, Offerors must provide a detailed budget showing major expense line items. Offers must show unit prices, quantities, and total price. All items, services, etc. must be clearly labeled and included in the total offered price. All cost information must be expressed in USD.

If selected, Offeror shall use its best efforts to minimize the financing of any taxes on goods and services, or the importation, manufacture, procurement, or supply thereof. If Offeror is eligible to apply for refunds on taxes paid, Offeror shall do so. Any tax savings should be reflected in the total cost.

Cost Breakdown by Deliverable

| <b>Deliverable</b>  | <b>Price (Lump Sum, All Inclusive)</b> |
|---|--|
| Gather and document global HR processes (manual and system) following a typical employee lifecycle.<br>Document HRIS challenges, pain points, and opportunities |  |
| Assess Current State HR technology  |  |
| Recommended Future HRIS System Architecture, System of Record, and Integration Points with other CI Systems, and overall technical infrastructure               |  |
| Recommend digital transformation roadmap (3 – 5 years) informed by IT’s technical roadmap   |  |
| Provide template and information to draft RFP, identify vendors to distribute RFP   |  |

Cost Breakdown by Cost Component

| <b>Description</b>                      | <b>Unit of measure (day, month etc)</b> | <b>Total period of engagement</b> | <b>Unit cost/rate</b> | <b>Total Cost for the Period</b> |
|---|---|-----------------------------------|-----------------------|----------------------------------|
| Consultant 1                            |   |                                   |                       |                                  |
| Consultant 2                            |   |                                   |                       |                                  |
| Sub-total Personnel                     |   |                                   |                       |                                  |
| Travel Costs (if applicable)            |   |                                   |                       |                                  |
| Other related Costs (please specify)    |   |                                   |                       |                                  |
| <b>Total Cost of Financial Proposal</b> |   |                                   |                       |                                  |



[RFP BUDGET TEMPLATE](#)