## 

## Grants Management Software (EPIC) and K2 Maintenance and Support

## Request for Proposal

Abstract

CIPE is seeking a vendor to provide maintenance and support services for their custom-built Grants Management Software (EPIC) and K2 Process Automaton Platform.

Shwetha Shivakumar

SShivakumar@cipe.org

# CIPE Overview

## Introduction

The Center for International Private Enterprise (CIPE) is one of the four core institutes of the NationalEndowment for Democracy and an affiliate of the US Chamber of Commerce.

Since 1983 CIPE has been working from the ground up with partners to find locally driven solutions to problems that affect the lives of millions of people. CIPE believes democracy is at its strongest when the private sector is flourishing. Working with local partners that include business associations, chambers of commerce, think tanks, universities and advocacy organizations, CIPE is helping create the enabling environment for business to thrive.

## What CIPE Does

<https://www.cipe.org/what-we-do/>

## Organization Background

CIPE is headquartered at 1211 Connecticut Avenue NW, Suite 700 Washington, DC 20036. CIPE currently has approximately;

* 90 HQ employees
* 32 Field employees
* 7 overseas consultants with network access

CIPE also has a global presence in the following regions of the world;

* Africa
* Asia
* Europe
* Latin America & the Caribbean
* Middle East

## Project Details

CIPE is embarking on a partner selection initiative to maintain, modify, and enhance K2 Business Process Automation platform and EPIC - custom-built Grant Management Software. We are looking for an engagement for a period of three months, with a possible extension for another six to nine months. We anticipate the support level required is roughly 5 – 10 hours per week.

***K2 Platform***

CIPE currently utilizes K2 to automate the following business processes. K2 is integrated with EPIC (grant management system – refer to page 4 for details) and SharePoint environment. The applications are hosted on-premise server environment.

**1. Payment Request**

The workflow is submitted by end users (originators) to request payments to vendors, partners, staff expense reimbursement, and credit card liquidations. The end user upload required documentation to the workflow as supporting documentation and enters account codes and project codes including the payment amount before submitting the request. Approval process includes approvals by project managers, finance and compliance teams, and senior management. Approvers can reject the payment request if the requirements are not met. If the request is rejected, the end user must resubmit the request to the workflow with the necessary information/documentation. Once approved and paid, the payment information is batched and sent to an external accountant to record in the financial system.

**2. HR Onboarding**

This is a simple workflow that allows Hiring Managers to submit basic information about the new hire. The approval process includes approval from HR, Operations and IT teams. There is a desire to revamp this workflow to incorporate additional information to help with user setup.

The table below lists the technical components.

|  |  |
| --- | --- |
| **Component** | **Implementation** |
| Operating System | Windows Server 2012 R2 |
| K2 Server | K2 BlackPearl Version 4.16 |
| Databases | MS SQL Server 2012 R2 |
| Document Management | SharePoint |

The partner will support the K2 platform by providing:

* Maintenance and troubleshooting on an ongoing basis
* Modifications/Enhancements to workflows

Key Goals will be to:

* Address existing workflow issues in a timely manner
* Build new workflows with customized forms and workflows that can integrate with data from back-end systems.
* Create and maintain Forms and Views using SmartObjects.
* Integrate K2 Workflow with Microsoft SharePoint, and SQL Server.
* Help migrate from K2 BlackPearl to K2 Cloud

***EPIC - Grants Management Software***

CIPE implemented EPIC to manage grant funding, reporting, and program implementation.

It is built using Java 6, with a backend SQL Server database, and SQL Server Reporting Services. The table below lists the technical components

|  |  |
| --- | --- |
| **Component** | **Implementation** |
| Operating System | Windows Server 2012 R2 |
| Web Server | Apache Tomcat 1.7 |
| Backend (Databases) | MS SQL Server 2012 R2 |
| Front End | Java Server Pages (JSP), Java 1.6, Spring Framework 3.1.0, Hibernate 3.6.5 |
| Reporting | SQL Server Reporting Services |
| Build Tool | Apache Maven |

The partner will support EPIC by providing

* Maintenance and troubleshooting
* Modifications/Enhancements, including SQL Server back-end database, front-end user interfaces, and Reporting services as needed.

Key Goals will be to:

* Developing and maintaining MS SQL Server database systems.
* Developing and maintaining user interfaces written using JSP.
* Developing and modifying SQL Server reports.
* Programming or using each software detailed above.
* Experience managing aggressive deadlines, even when unanticipated short-term requests are made.
* Ability to work seamlessly across multiple partners, including CIPE and Managed Service Provider (MSP).
* Ability to address critical issues in a timely manner.
* Ability to achieve and maintain high customer satisfaction.

***RFP Process***

CIPE is planning to select a partner to maintain, modify, and enhance K2 platform and EPIC via this Request for Proposal (RFP). This RFP does not commit CIPE to contract for any services. CIPE will not accept any unsolicited proposals for this and/or related projects. Respondents are advised that CIPE will not pay for any information or administrative costs incurred in response to this RFP. All costs associated with responding to this RFP will be solely at the interested party’s expense.

***Selection Overview***

Potential partners shall provide general information about their typical new client onboarding methodology, services and company, taking into consideration the information detailed previously in this document. At this point, CIPE is only looking for general information and pricing.

We understand that the final costs will require additional discussions and estimations. We are interested in your recommendations for general structure and support philosophy with some representative prices where possible to help us evaluate the overall scale. We do want to understand how you arrive at your pricing in the form of an executive-style summary. We will work with the finalists to revise final pricing based on the specific services that are desired.

## Initial Responses

The initial responses will be reviewed, and a few potential partners will be invited to perform a general presentation and discuss their capabilities that are in line with this project. The initial partner responses will be evaluated based on the elements detailed in the next section as it pertains to the desired partner criteria. CIPE would like the partners to focus on their value propositions, core service methodology, and range of typical services. Where possible, examples of similar projects would be helpful.

## Evaluation Process

CIPE will review the potential partners through this phase primarily on key capabilities and services they either require or desire based on the general business needs as described in this document. Following a review of the RFP responses, they will select those partners who have services and experience they believe could most effectively serve CIPE’s needs and timeline. At that point, we will meet with the finalist partners to discuss your specific recommendations and provide feedback on which options we desire so you can prepare final pricing.

While CIPE’s business requirements are relatively straightforward, this will provide potential partners with the opportunity to customize their approach based on CIPE’s specific business requirements.

Assuming CIPE has identified one to three qualified candidates, those potential partners will then be asked to submit a proposal to include final estimates and related project costs and timelines for EPIC and K2 Maintenance and Support for the organization. CIPE will evaluate the proposals and make a decision regarding the final selection at that time.

At the end of the process, all respondents may be provided feedback on their written responses and interviews as a courtesy in appreciation for their investment in this process.

## Partner Selection Project Details

By using this process, it is our intent to minimize the amount of initial work required of the potential partners to allow for a quicker selection process. Potential partners will only be asked to provide detailed and customized responses once they have been determined to be a strong candidate for the partner selection. At that point, with the understanding that they are not one of many and based on CIPE’s flexibility in achieving their needs, we expect they will be willing to quickly turn around a detailed proposal.

Following is a general timeline outlining the process steps with estimated dates for each step of the process. These dates may be adjusted through the process as long as it doesn’t endanger the overall completion date. By participating in the RFP process, potential partners agree that they can adhere to the following general timeline and the meeting times they reserve through this process. Depending on partner availability and capabilities we are open to accelerating the selection timeline.

|  |  |
| --- | --- |
| **Task** | **Estimated timeline** |
| RFP distributed to Partners | 6/13/2019 |
| Partners respond to RFP | 6/19/2019 |
| Analyze bids / select finalists | 6/21/2019 |
| Follow-up questions to Partners | 6/24/2019 |
| Partner(s) provide final proposal | 6/26/2019 |
| Partner selection | 6/28/2019 |

## Response Elements

Parties interested in pursuing this project should provide CIPE with the following information:

* General background of your company including staff size, locations and years in business
* General information on the services to be proposed including any standard literature as applicable
* A reference list of similar clients
* Standard Service Level Agreements – with pricing options
* Availability to take over support for CIPE as early as August 2019
* Other general information you may deem applicable

Please submit completed proposals electronically (i.e., Word or PDF) to Shwetha Shivakumar, [SShivakumar@cipe.org](mailto:SShivakumar@cipe.org), no later than June 19, 2019. Finalists may be asked to participate in one or more in-person or video-conference interviews. Questions should also be directed to Shwetha Shivakumar. Written responses to the questions will be provided via email in a reasonable time frame.

Thank you for your interest and consideration.

Shwetha Shivakumar

Director, Information Technology

Email: [SShivakumar@cipe.org](mailto:SShivakumar@cipe.org); Work phone: 202.721-9208